



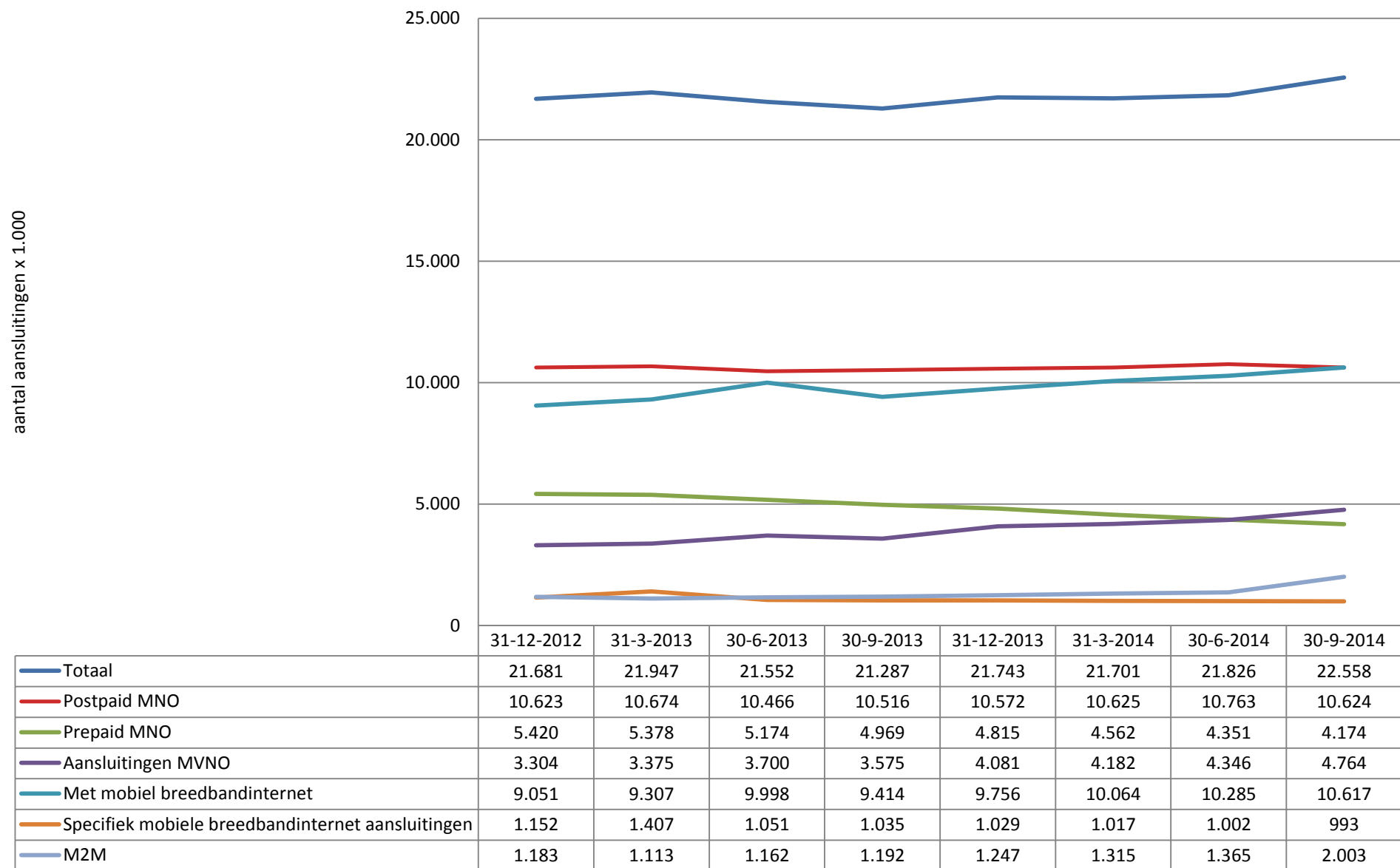
Telecommonitor Derde kwartaal 2014

De Autoriteit Consument & Markt (ACM) publiceert elk kwartaal de marktcijfers van de telecomsector. De Telecommonitor laat de ontwikkelingen zien op het gebied van mobiele diensten, vaste telefonie, breedband, zakelijke netwerkdiensten, televisie en bundels op basis van cijfers van de belangrijkste partijen in de telecomsector.

Voor de Telecommonitor verstrekken de grootste partijen in de sector periodiek gegevens over hun activiteiten. ACM controleert deze gegevens. Zo houdt ACM een vinger aan de pols bij de ontwikkelingen op de diverse markten. De cijfers vormen een belangrijk basis voor de driejaarlijkse marktanalyses van ACM.

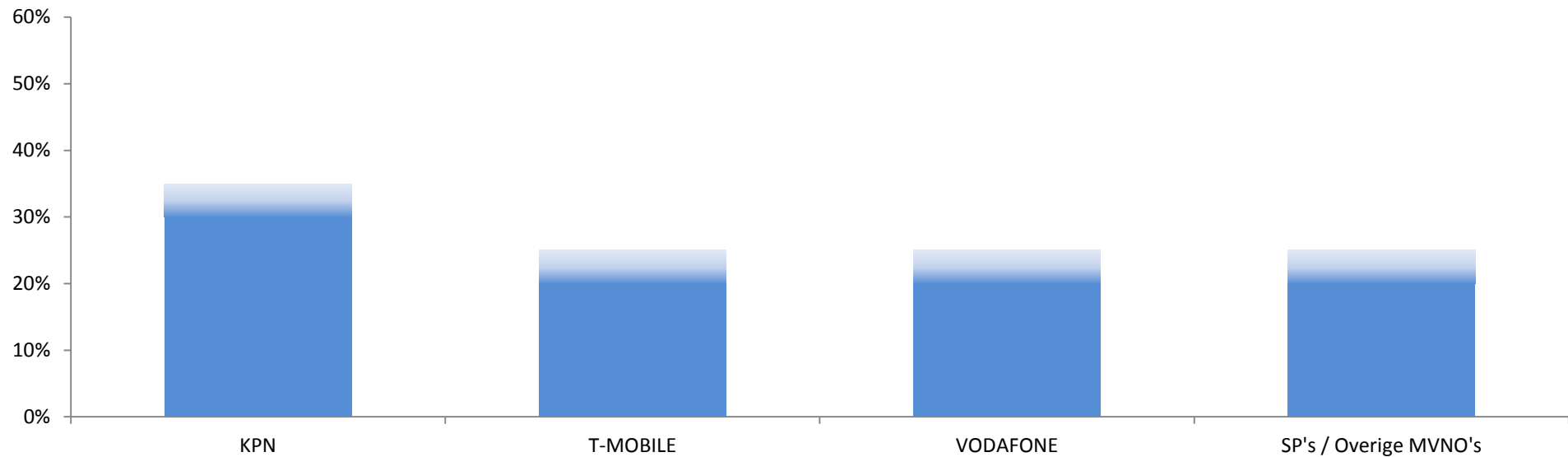


Mobiel: Aantal retailsluitingen





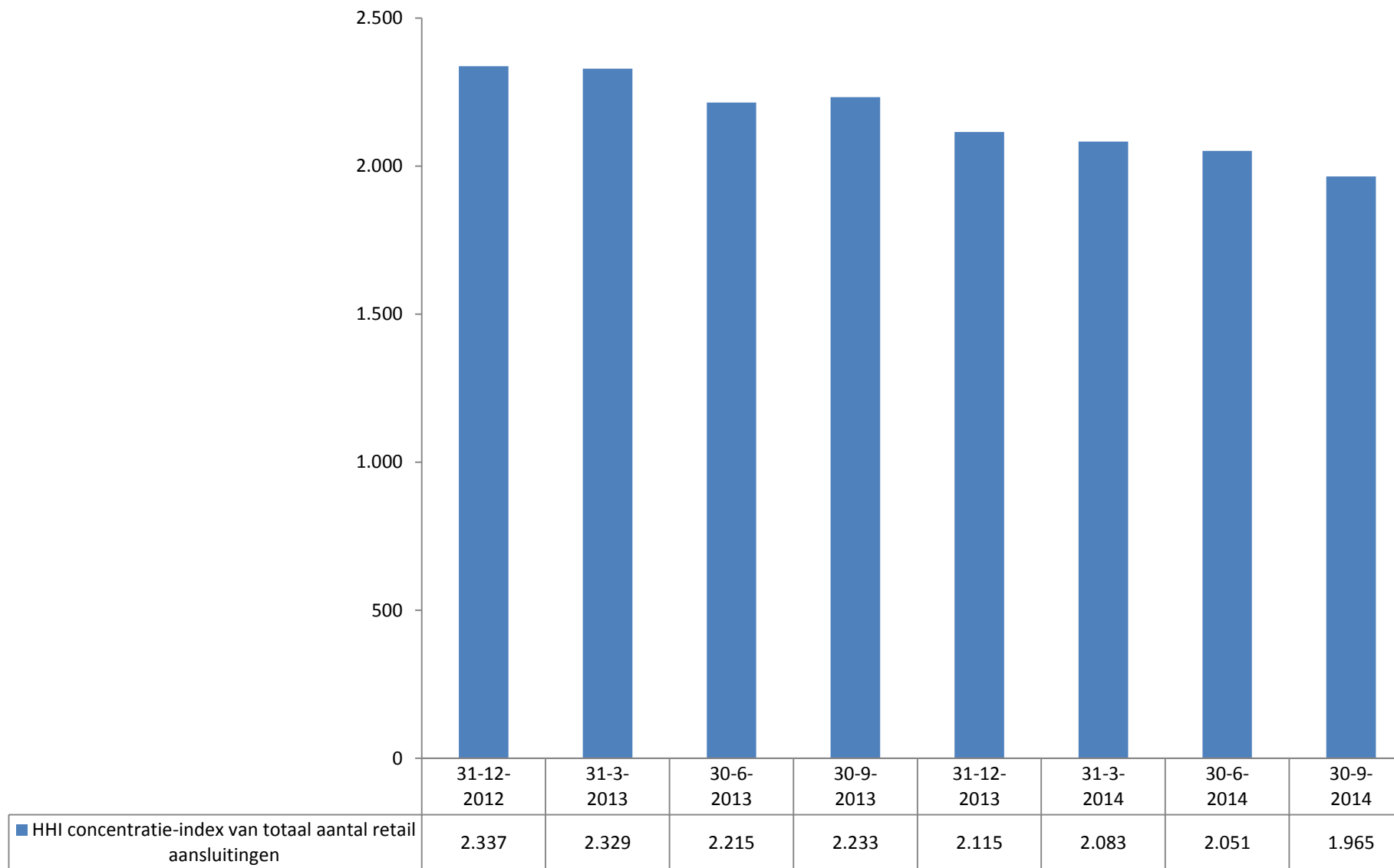
Mobiel: Marktaandelen retail aansluitingen (2014Q3)



	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014	30-6-2014	30-9-2014
KPN	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[30-35%]
T-MOBILE	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]
VODAFONE	[25-30%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]
SP's / Overige MVNO's	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[20-25%]	[20-25%]	[20-25%]

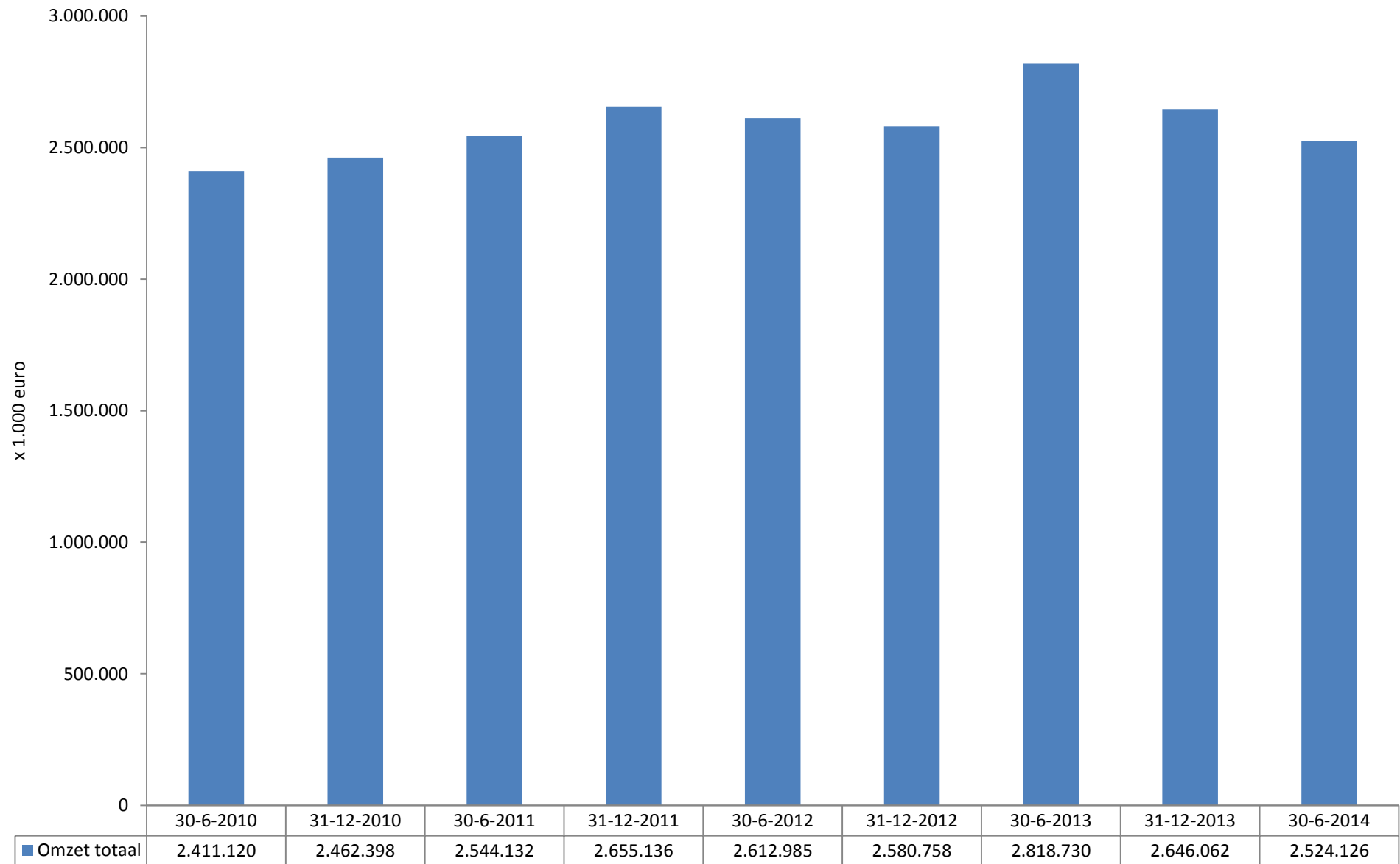


Mobiel: Herfindahl-Hirschman Index retail aansluitingen



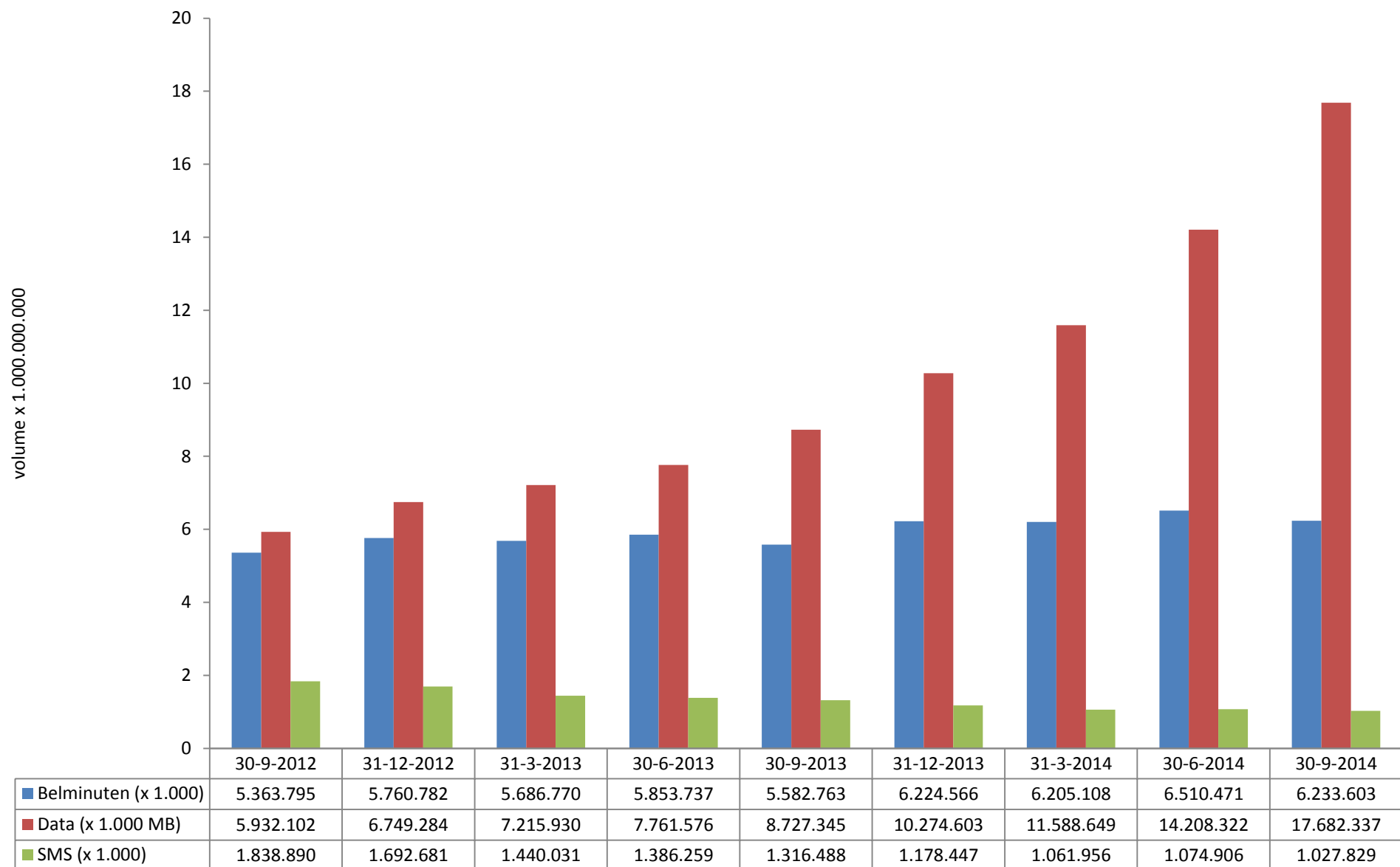


Mobiel: Omzet retail per half jaar



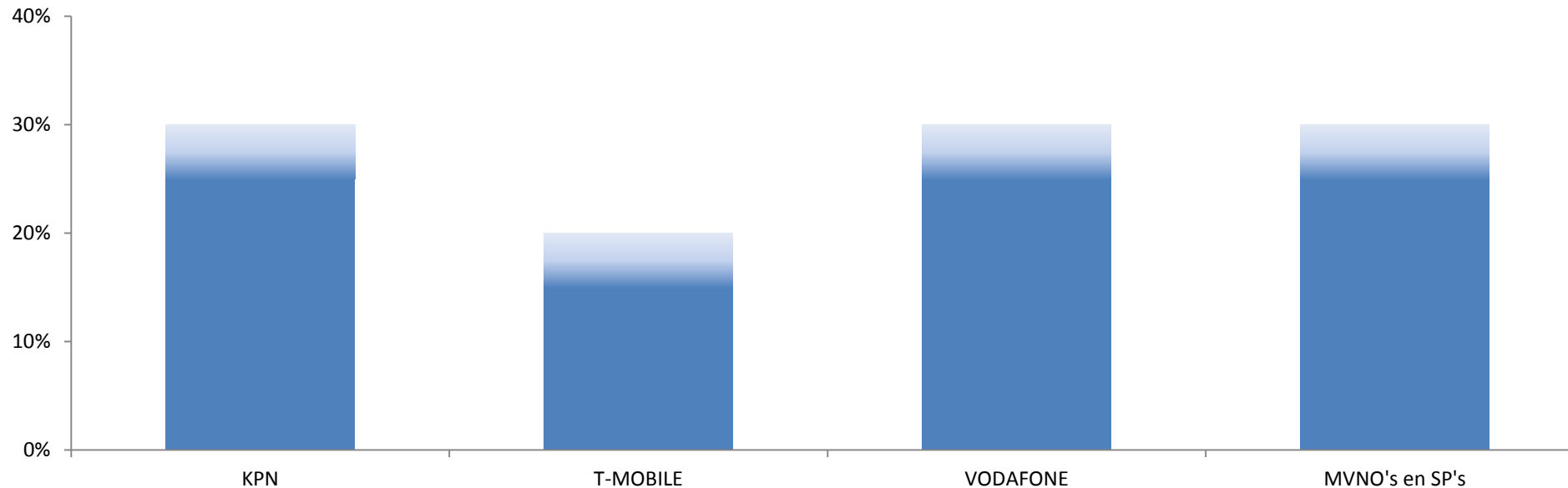


Mobiel: Volume retail belminuten, data en sms (MNO's en MVNO's)





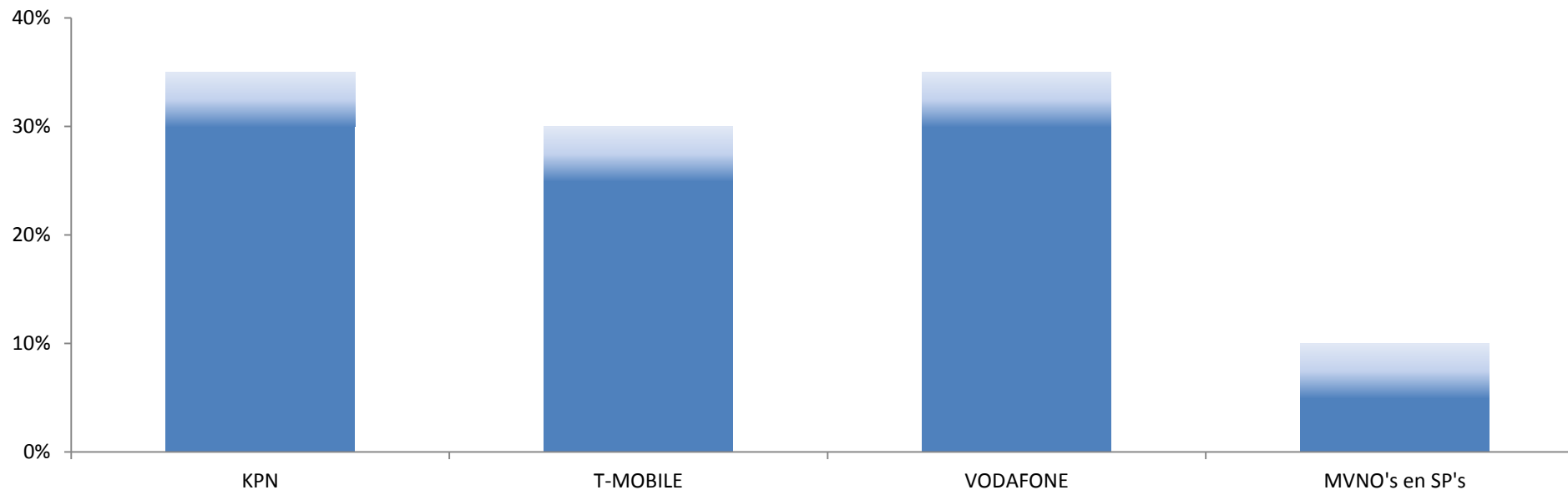
Mobiel: Marktaandelen op basis van totaal volume retail belminuten (2014Q3)



	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014	30-6-2014	30-9-2014
KPN	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]
T-MOBILE	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]
VODAFONE	[20-25%]	[20-25%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]	[20-25%]	[25-30%]
MVNOs and SPs	[20-25%]	[20-25%]	[20-25%]	[25-30%]	[25-30%]	[25-30%]	[30-35%]	[25-30%]



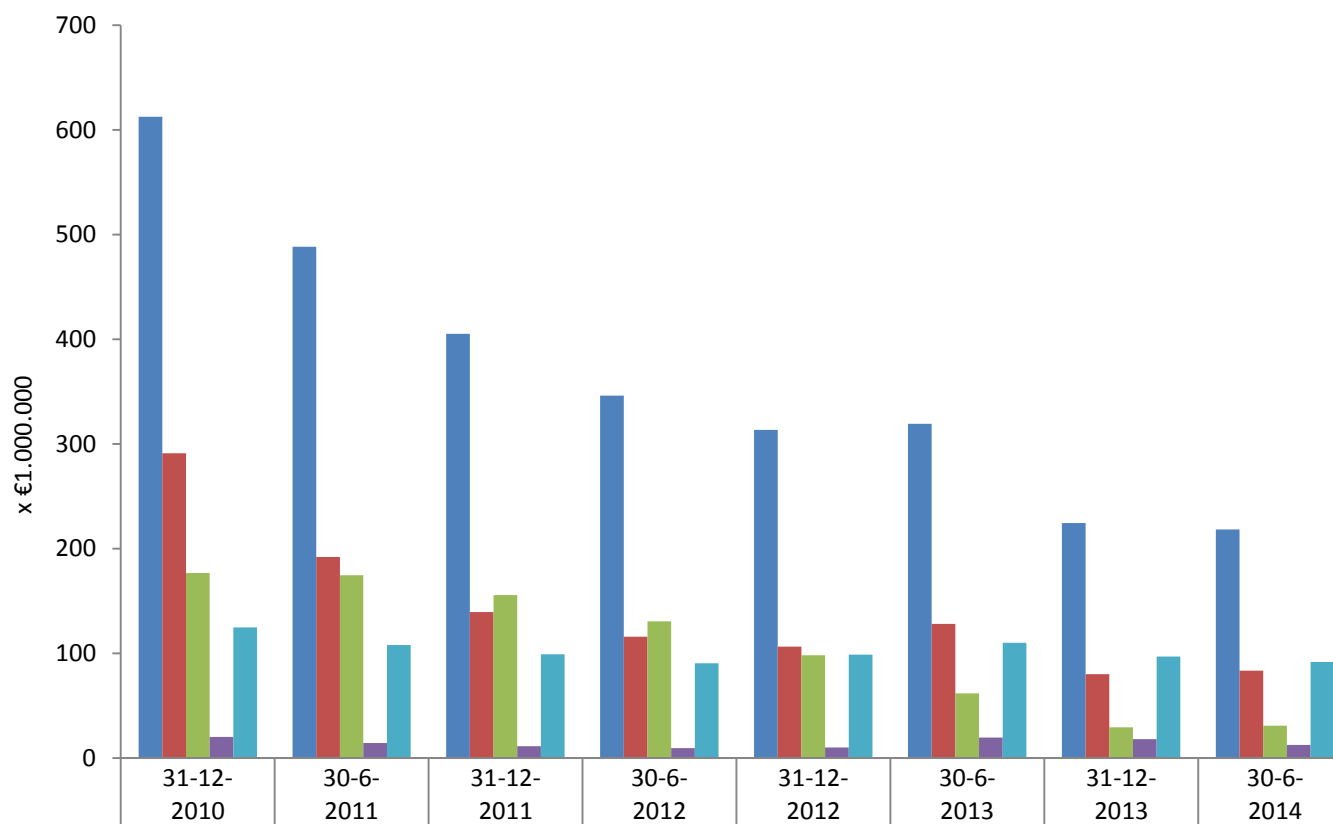
Mobiel: Marktaandelen op basis van totaal volume retail data (2014Q3)



	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014	30-6-2014	30-9-2014
KPN	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[25-30%]	[25-30%]	[30-35%]	[30-35%]
T-MOBILE	[35-40%]	[35-40%]	[30-35%]	[30-35%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]
VODAFONE	[25-30%]	[25-30%]	[25-30%]	[30-35%]	[30-35%]	[30-35%]	[30-35%]	[30-35%]
MVNO's en SP's	[0-5%]	[0-5%]	[0-5%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]



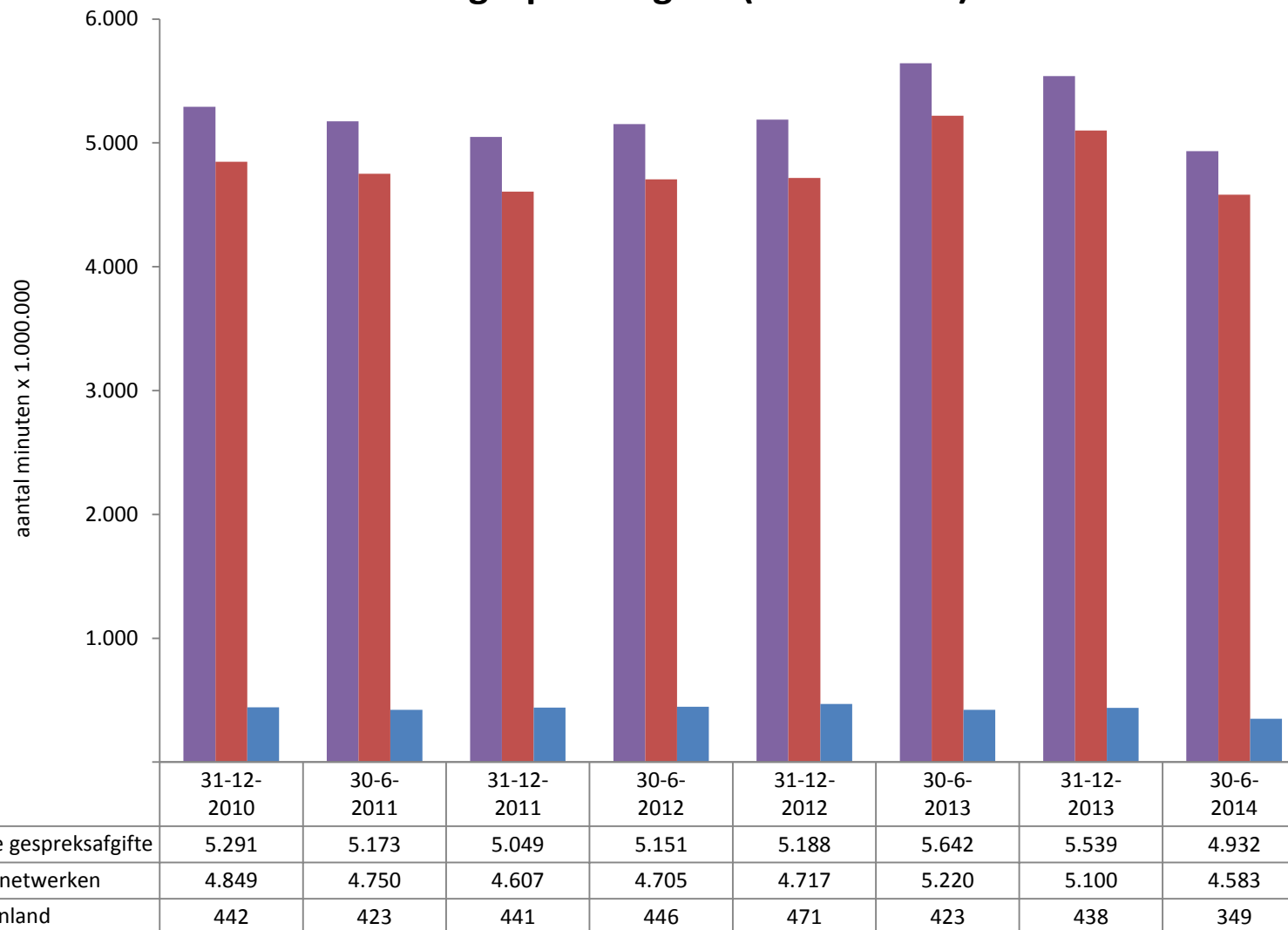
Mobiel: Omzet wholesale gespreksafgifte



	31-12-2010	30-6-2011	31-12-2011	30-6-2012	31-12-2012	30-6-2013	31-12-2013	30-6-2014
■ Totaal omzet wholesale gespreksafgifte	613	489	405	346	313	319	225	218
■ Omzet gespreksafgifte spraakdiensten nationaal	291	192	139	116	106	128	80	83
■ Omzet gespreksafgifte niet-spraakdiensten nationaal	177	175	155	130	98	62	29	31
■ Omzet gespreksafgifte vanuit het buitenland	20	14	11	9	10	19	18	13
■ Omzet van diensten geleverd aan service providers en MVNO's	125	108	99	91	99	110	97	92

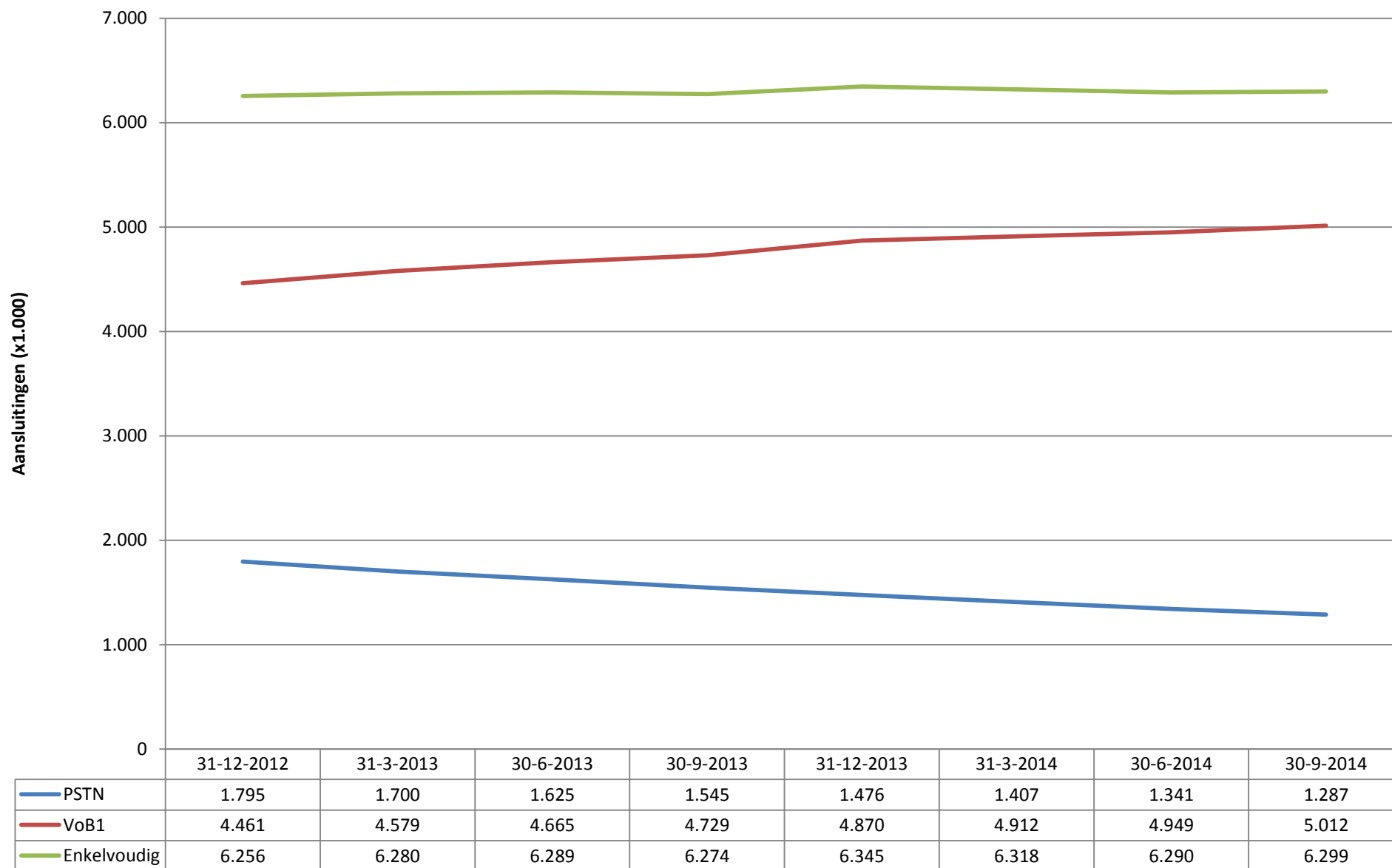


Mobiel: Volume wholesale gespreksafgifte (excl. on-net)



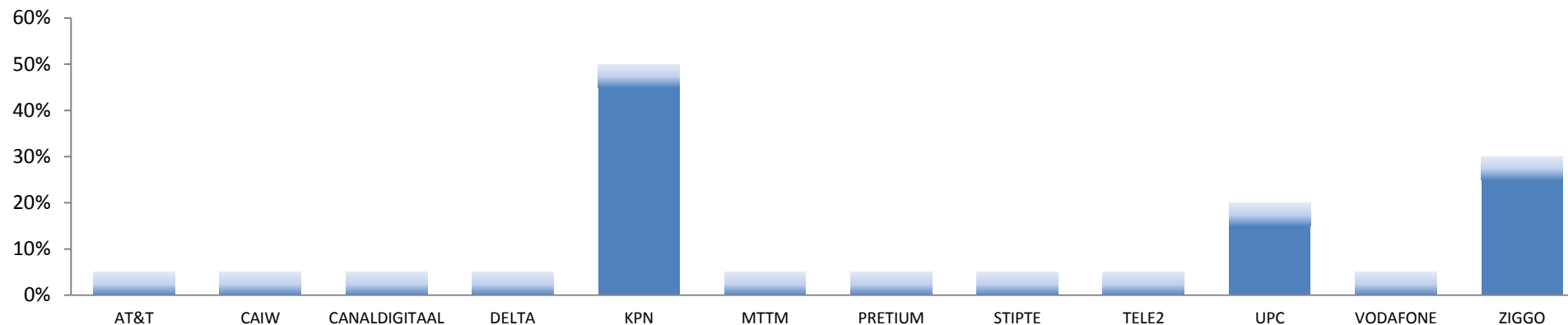


Vaste telefonie: Aantal retail enkelvoudige aansluitingen





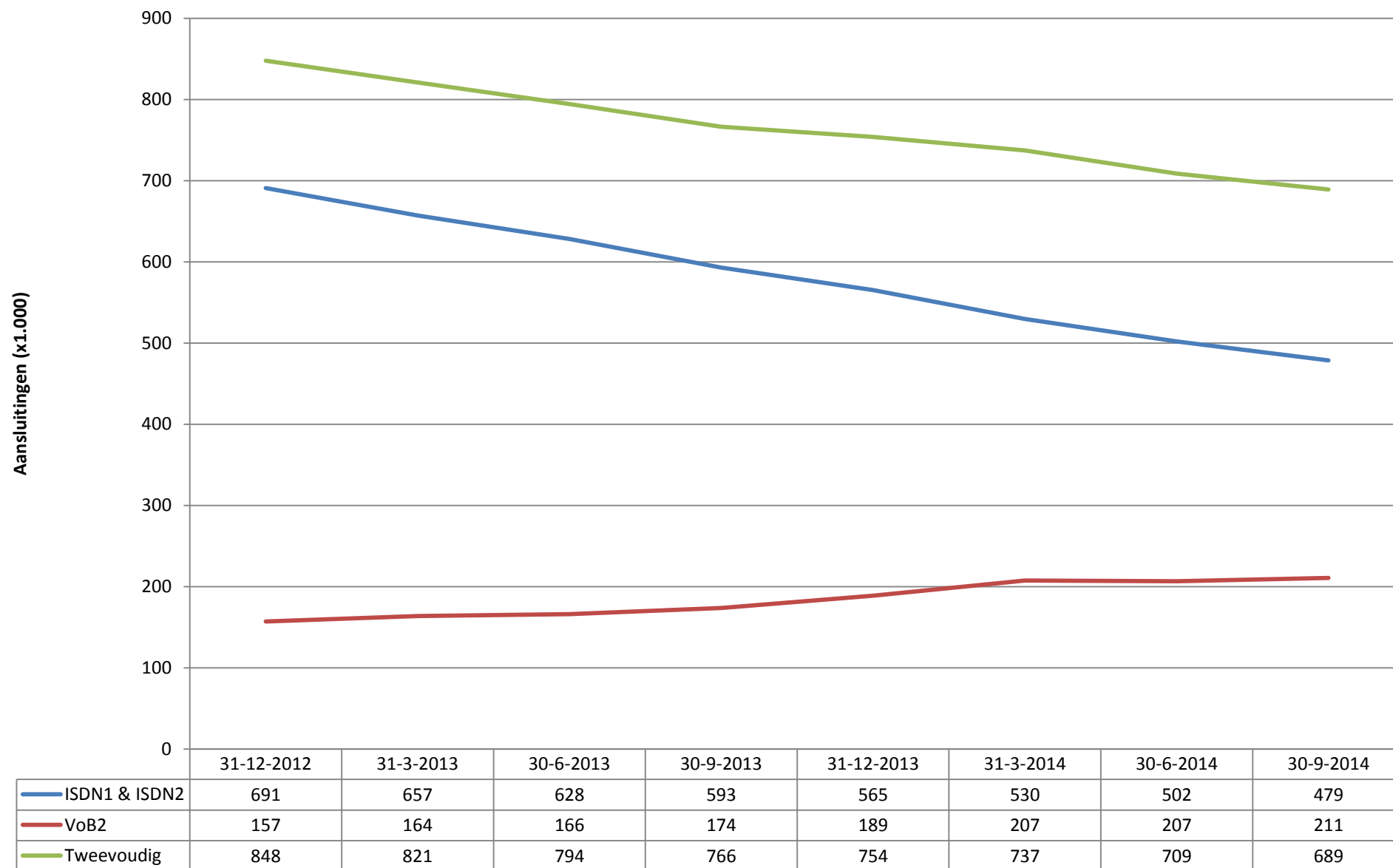
Vaste telefonie: Marktaandelen enkelvoudige retail aansluitingen (2014Q3)



	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014	30-6-2014	30-9-2014
AT&T	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
CAIW	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
CANALDIGITAAL	-	-	-	-	-	[0-5%]	[0-5%]	[0-5%]
DELTA	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ESPRIT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-	-	-	-
KPN	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]
MTTM	-	-	-	-	[0-5%]	[0-5%]	[0-5%]	[0-5%]
PRETIUM	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
STIPTE	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
TELE2	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[0-5%]	[0-5%]	[0-5%]
T-MOBILE	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-	-	-
UPC	[10-15%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]
VODAFONE	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ZIGGO	[20-25%]	[20-25%]	[20-25%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]

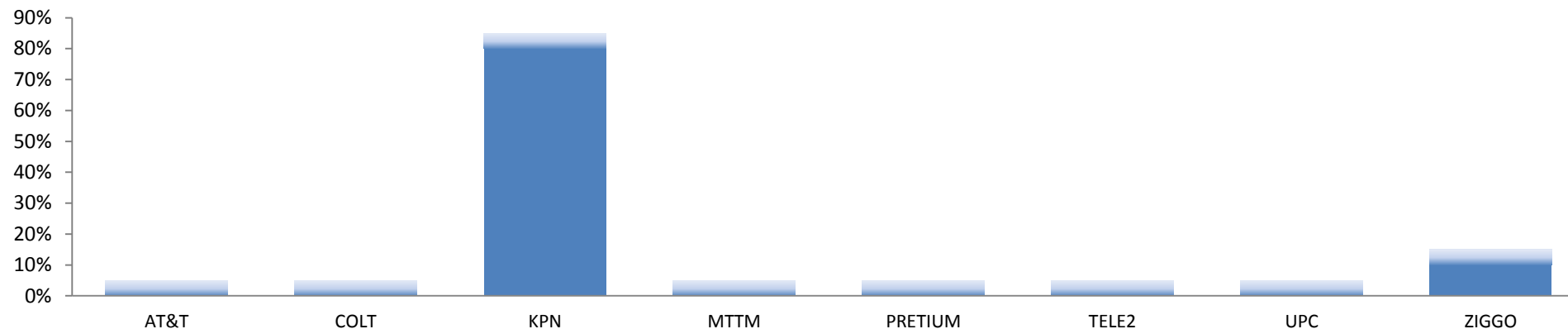


Vaste telefonie: Aantal tweevoudige retail aansluitingen





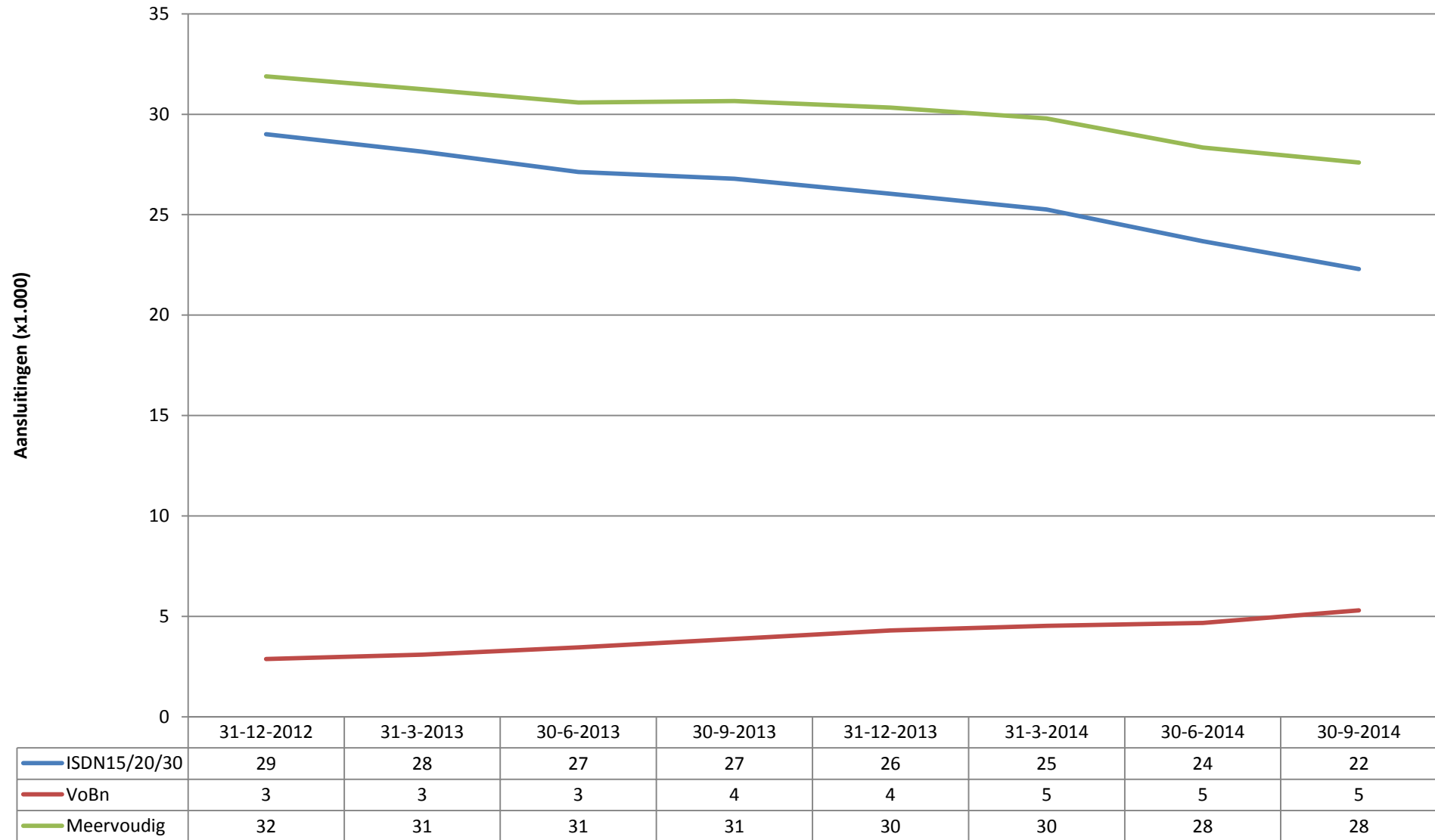
Vaste telefonie: Marktaandelen tweevoudige retail aansluitingen (2014Q3)



	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014	30-6-2014	30-9-2014
AT&T	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
COLT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ESPRIT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-	-	-	-
KPN	[85-90%]	[85-90%]	[85-90%]	[85-90%]	[80-85%]	[80-85%]	[80-85%]	[80-85%]
MTTM	-	-	-	-	[0-5%]	[0-5%]	[0-5%]	[0-5%]
PRETIUM	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
TELE2	[0-5%]	[5-10%]	[5-10%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
UPC	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ZIGGO	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[10-15%]	[10-15%]	[10-15%]

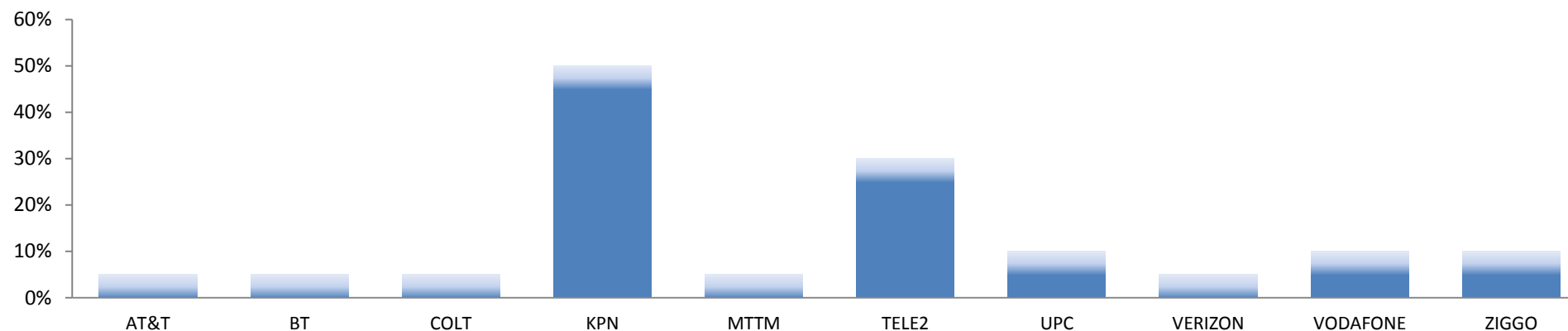


Vaste telefonie: Aantal meervoudige retail aansluitingen (incl. VoB meervoudig)





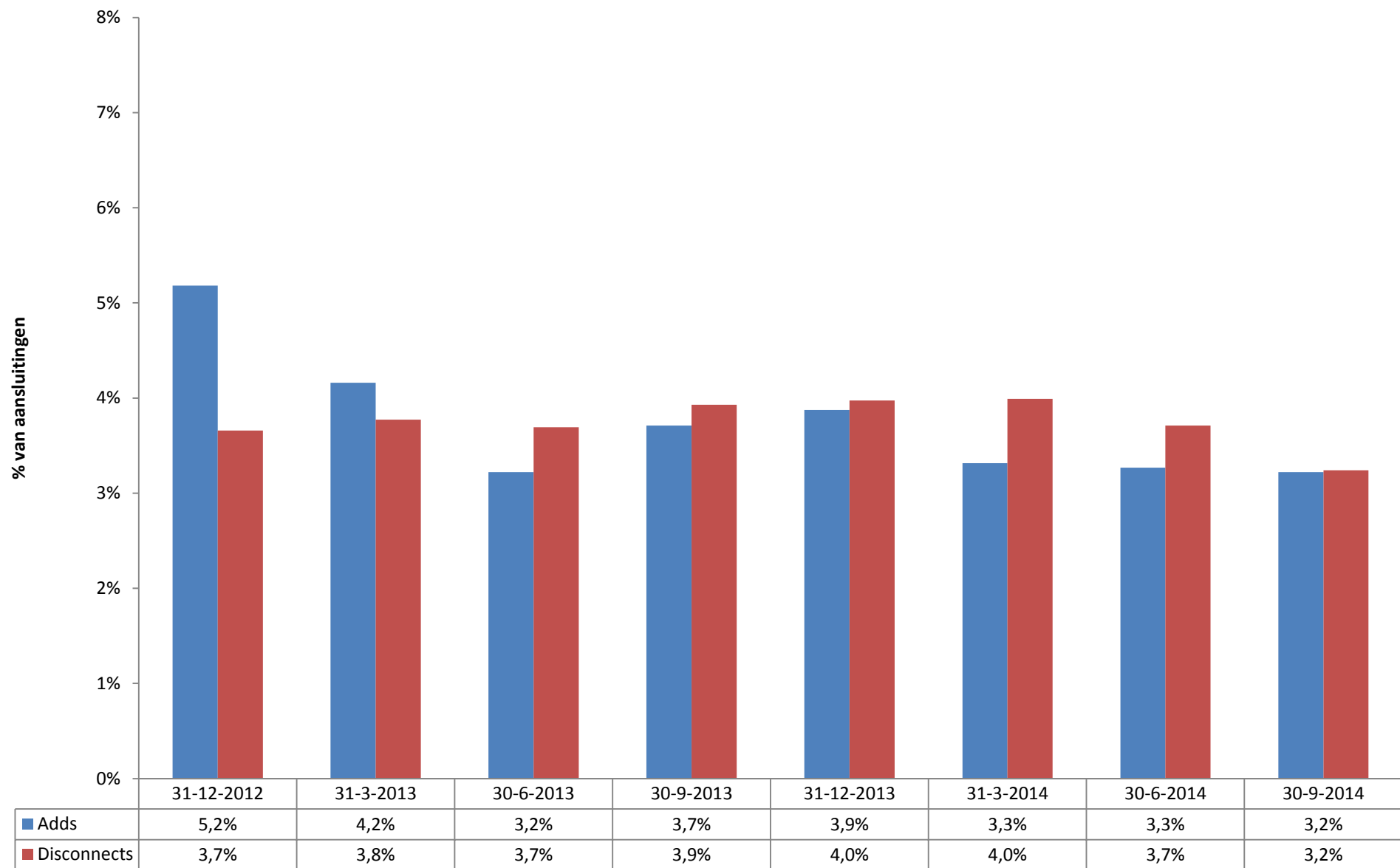
Vaste telefonie: Marktaandelen meervoudige retail aansluitingen (2014Q3)



	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014	30-6-2014	30-9-2014
AT&T	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
BT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
COLT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ESPRIT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-	-	-	-
KPN	[50-55%]	[50-55%]	[50-55%]	[50-55%]	[50-55%]	[50-55%]	[45-50%]	[45-50%]
MTTM	-	-	-	-	[0-5%]	[0-5%]	[0-5%]	[0-5%]
TELE2	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[25-30%]
UPC	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[0-5%]	[0-5%]	[5-10%]
VERIZON	[5-10%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
VODAFONE	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]
ZIGGO	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]



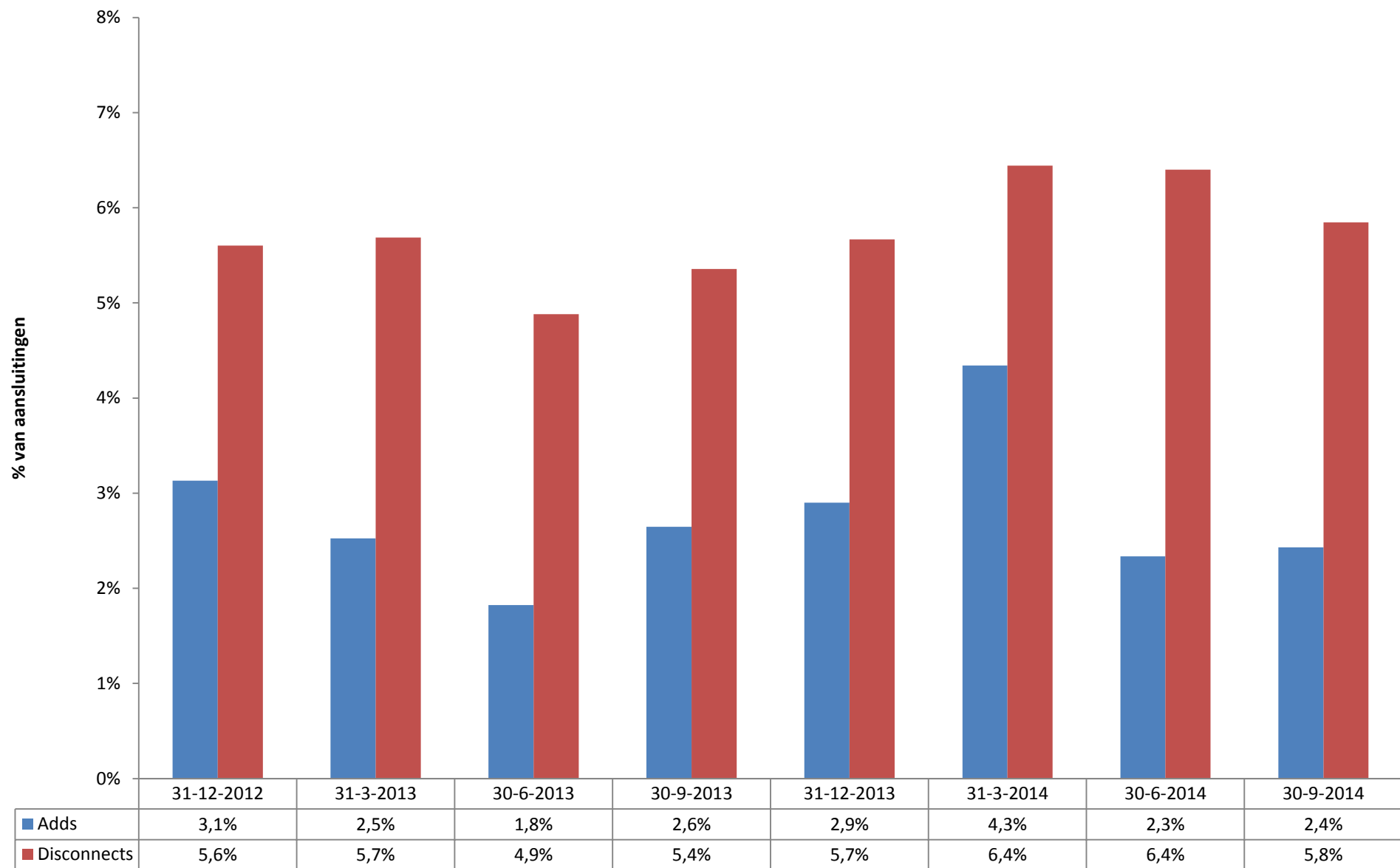
Vaste telefonie: Churn op basis van aantal retail enkelvoudige aansluitingen



Op basis van vragen 2_A2_1,7_1 en 2_A4_1,7_1-2 van de Telecommonitor.



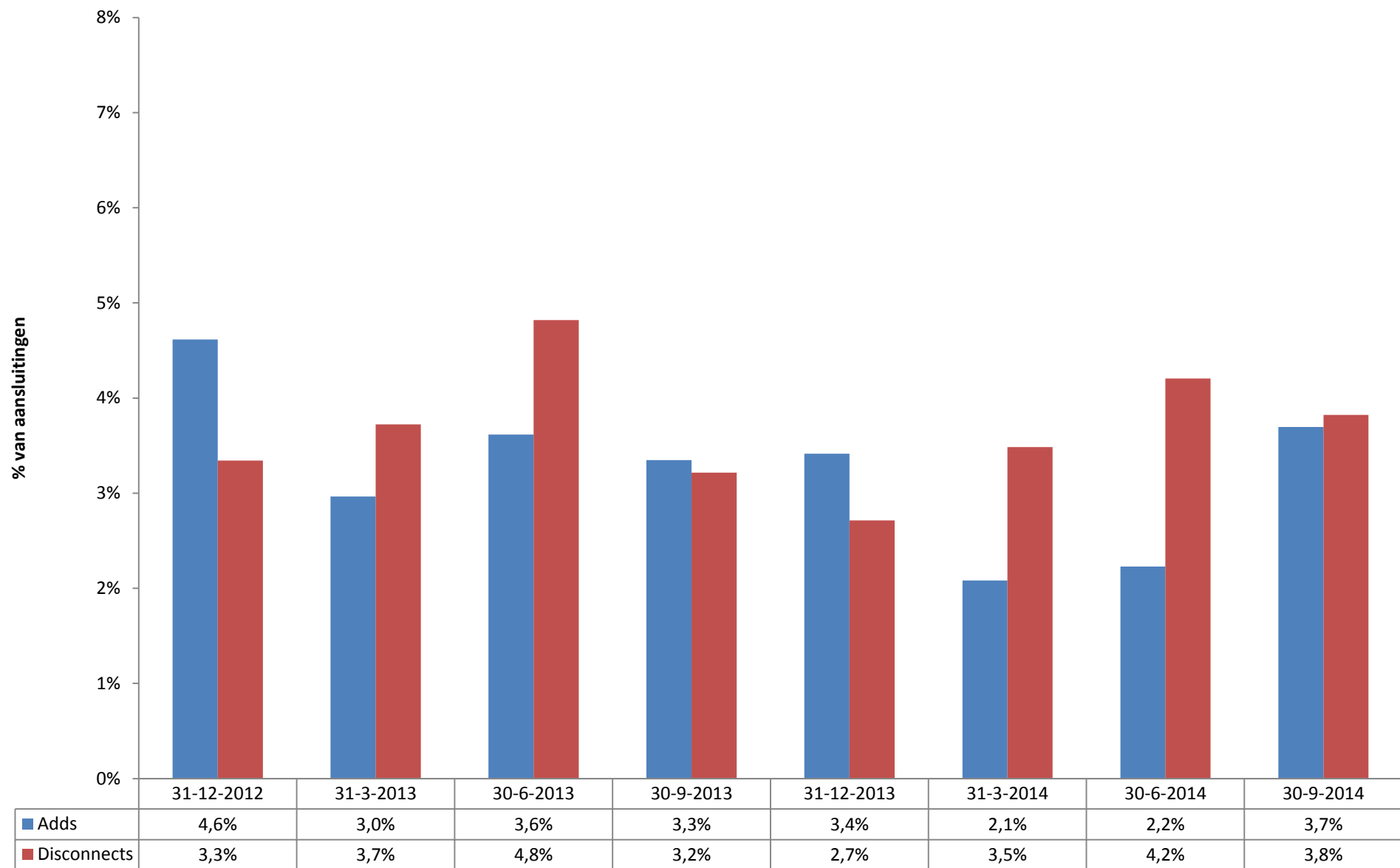
Vaste telefonie: Churn op basis van aantal retail tweevoudige aansluitingen



Op basis van vragen 2_A2_2,3,8_1 en 2_A4_2,3,8_1-2 van de Telecommonitor.



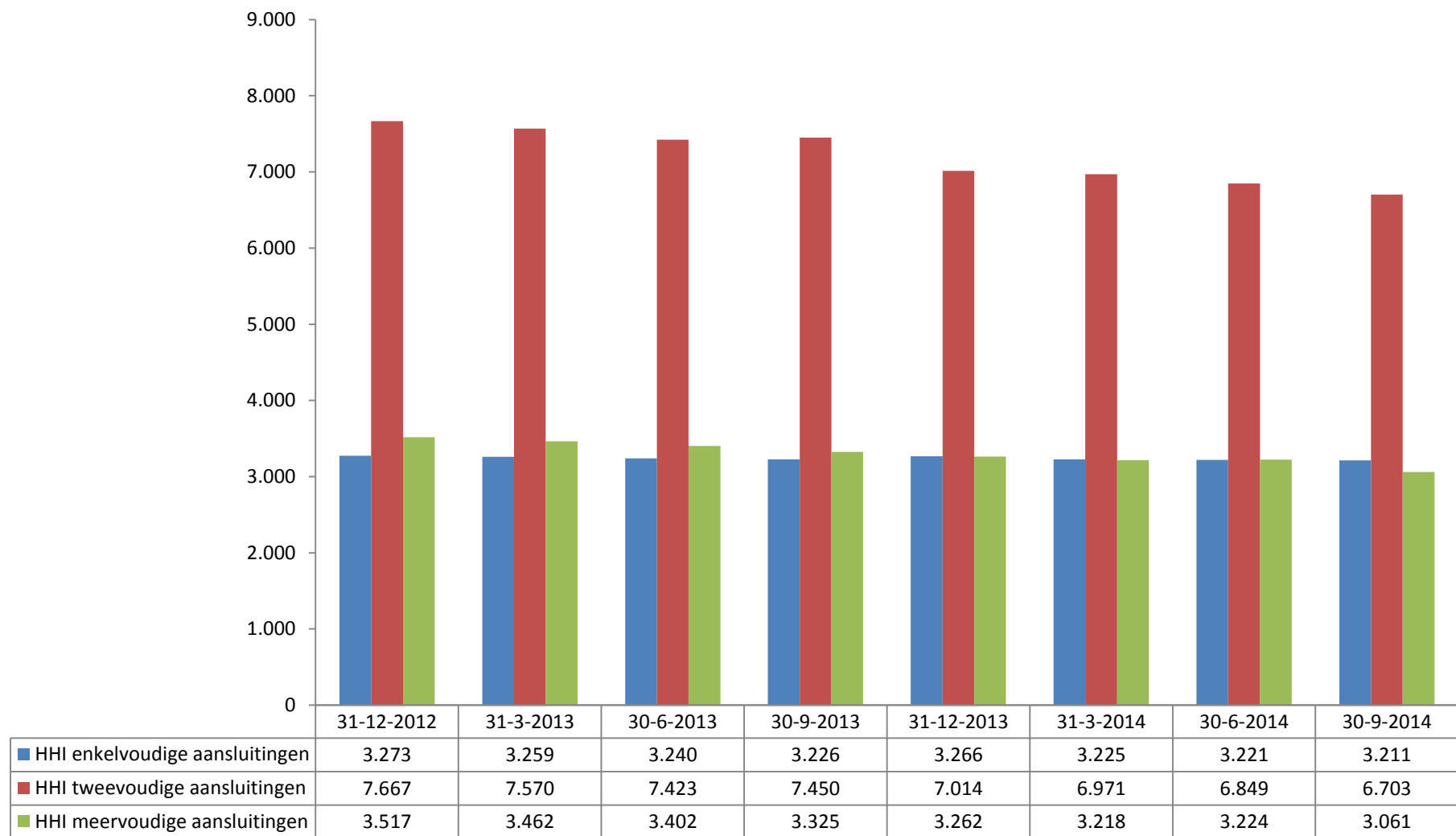
Vaste telefonie: Churn op basis van aantal retail meervoudige aansluitingen



Op basis van vragen 2_A2_4,5,6,9_1 en 2_A4_4,5,6,9_1-2 van de Telecommonitor.

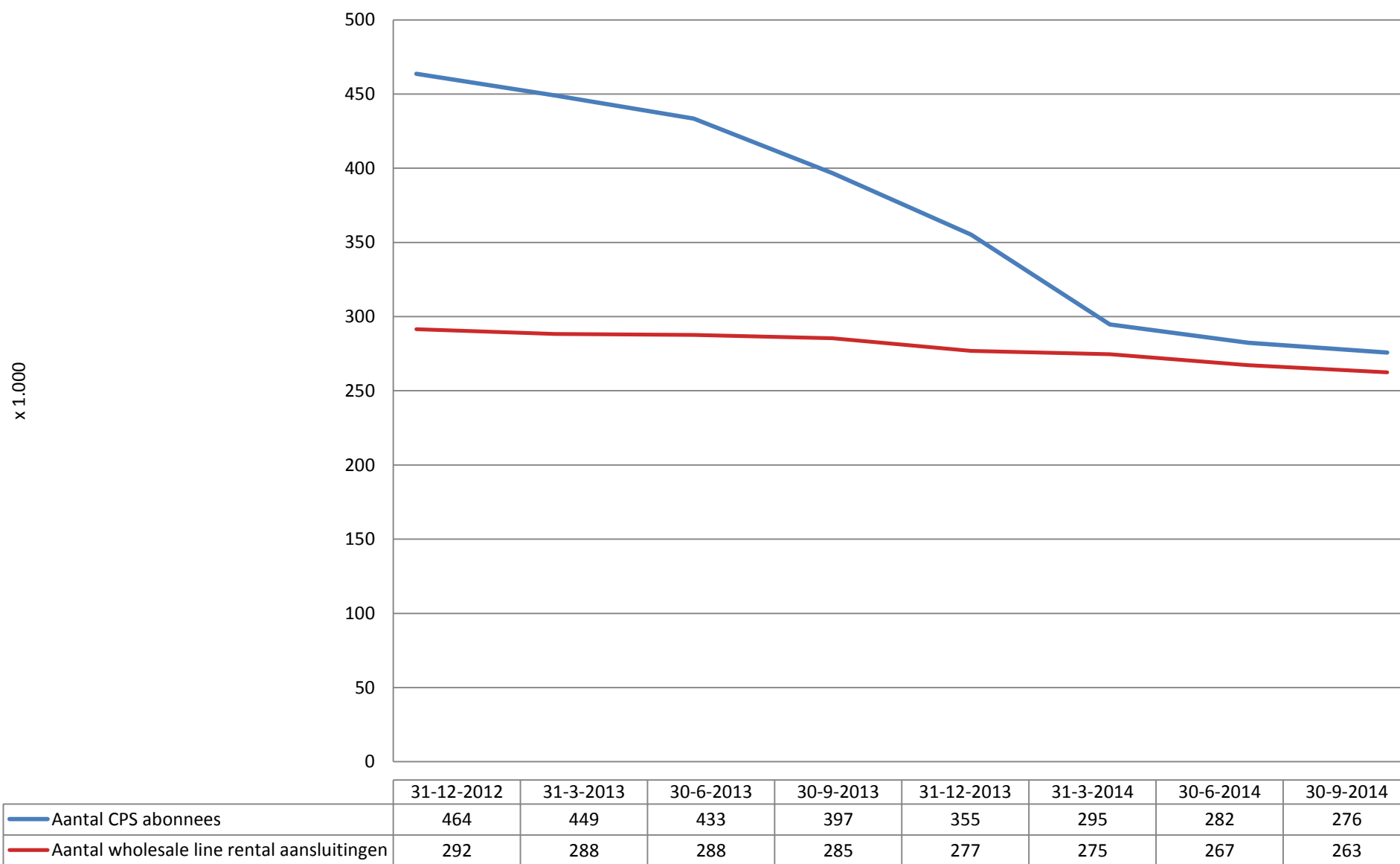


Vaste telefonie: Herfindahl-Hirschman Index van retail aansluitingen



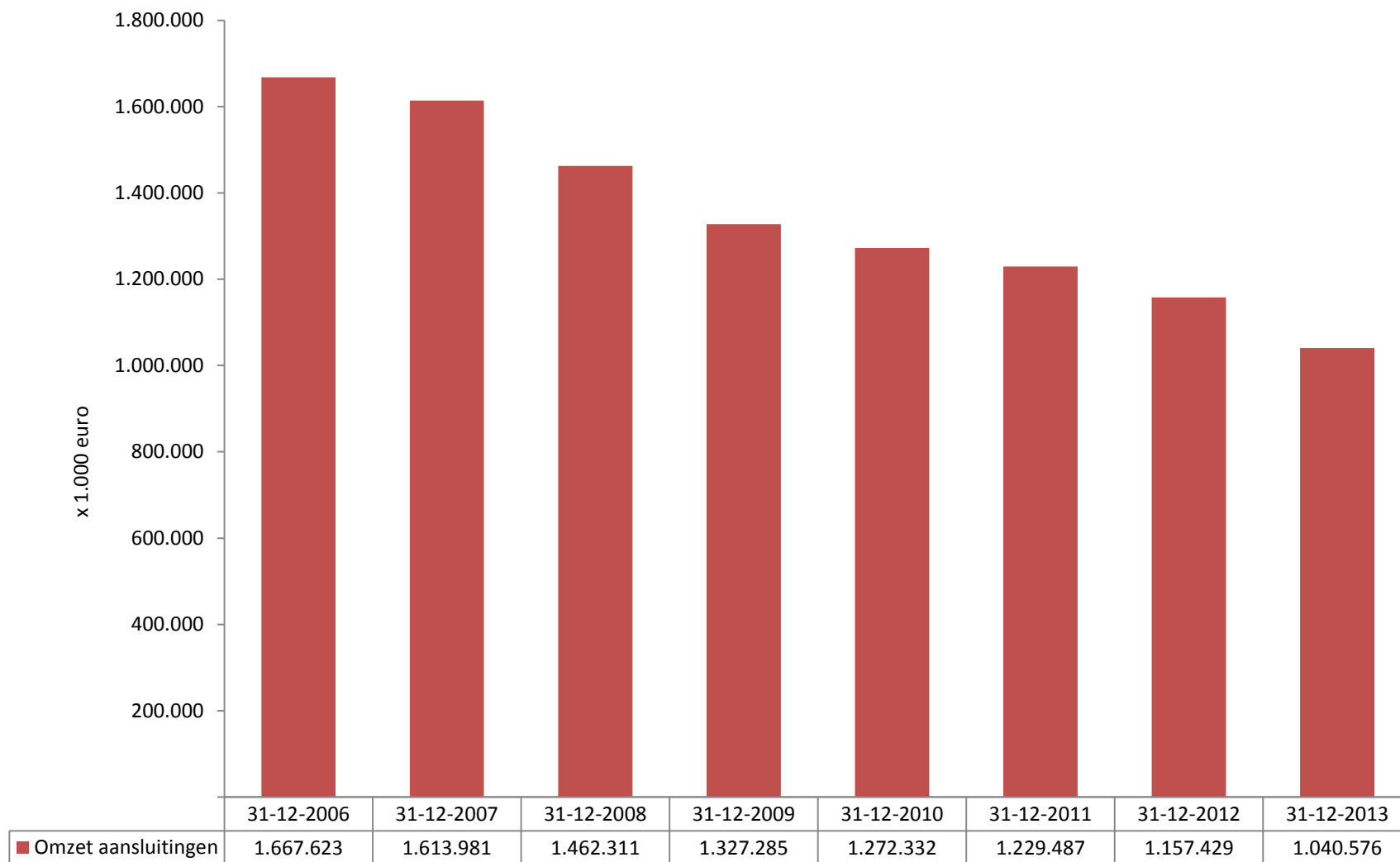


Vaste telefonie: Aantal retail WLR aansluitingen en CPS abonnees



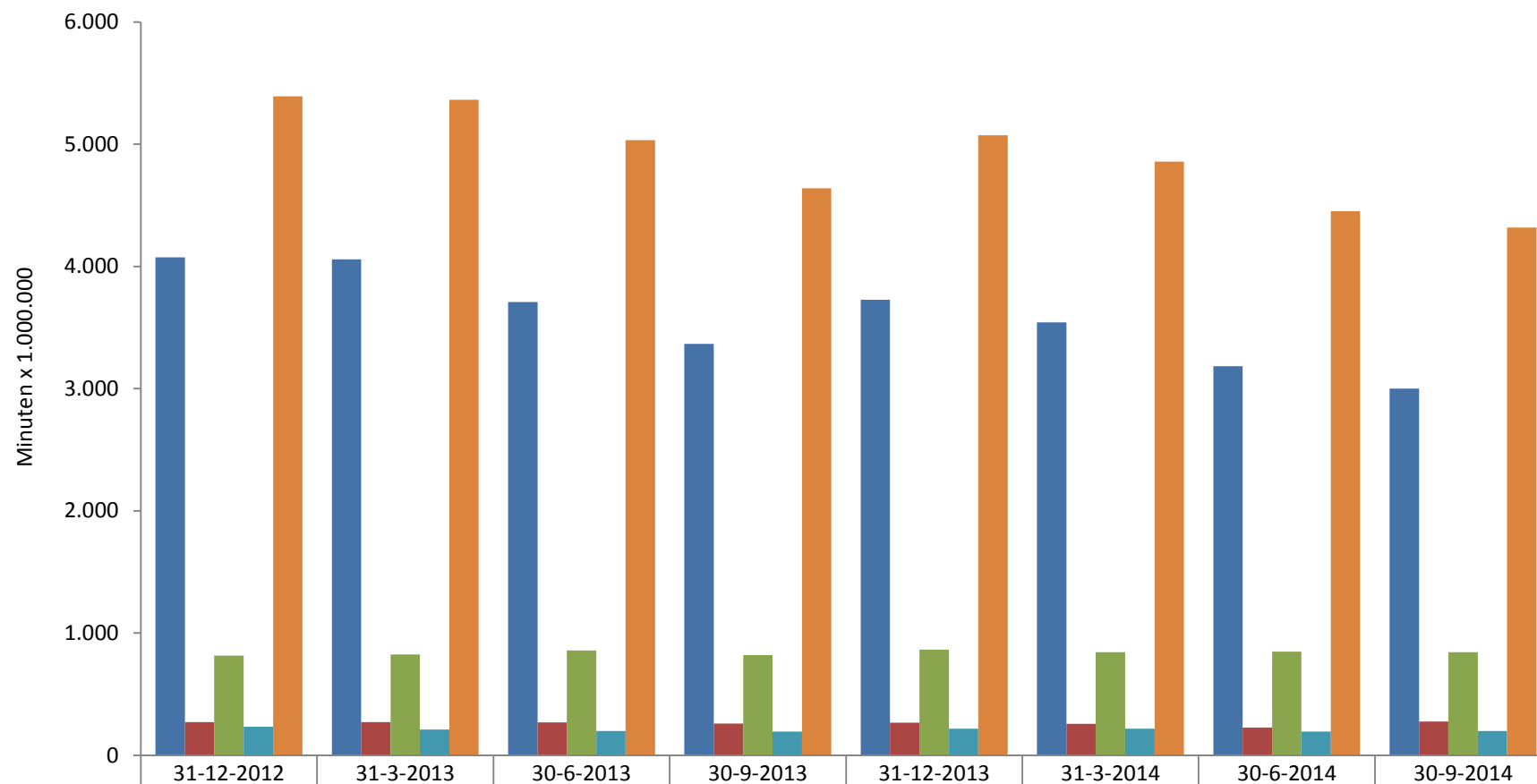


Vaste telefonie: Jaaromzet retail aansluitingen PSTN + VoB





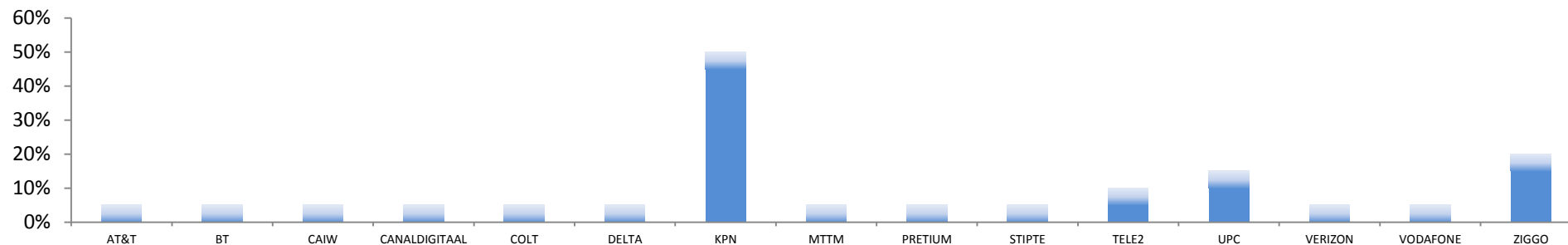
Vaste telefonie: Totaal volume retail belminuten



■ Lokaal + nationaal	4.073	4.059	3.708	3.367	3.726	3.541	3.183	3.001
■ Internationaal	270	270	269	259	265	258	227	275
■ Vast-mobiel	815	824	857	820	864	843	847	844
■ Overig verkeer	234	211	199	193	218	216	193	198
■ Totaal verkeer	5.393	5.364	5.033	4.639	5.073	4.858	4.451	4.317



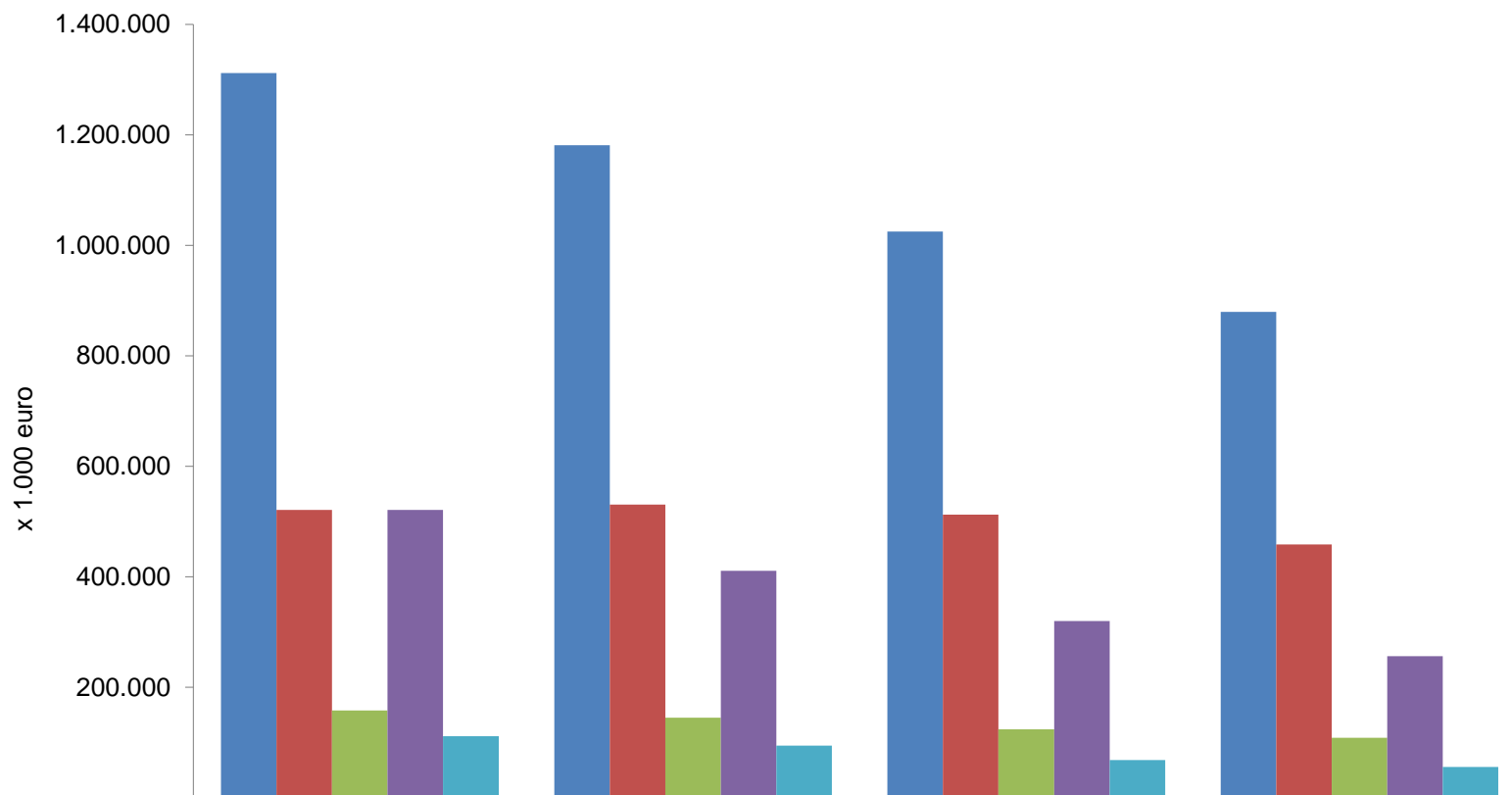
Vaste telefonie: Marktaandelen volume retail belminuten (2014Q3)



	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014	30-6-2014	30-9-2014
AT&T	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
BT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
CAIW	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
CANALDIG	-	-	-	-	-	[0-5%]	[0-5%]	[0-5%]
COLT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
DELTA	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ESPRIT	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-	-	-	-
KPN	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]	[45-50%]
MTTM	-	-	-	-	[0-5%]	[0-5%]	[0-5%]	[0-5%]
PRETIUM	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
STIPTTE	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
TELE2	[10-15%]	[5-10%]	[10-15%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]
T-MOBILE	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-	-	-
UPC	[10-15%]	[10-15%]	[10-15%]	[10-15%]	[10-15%]	[10-15%]	[10-15%]	[10-15%]
VERIZON	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
VODAFON	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ZIGGO	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]	[15-20%]



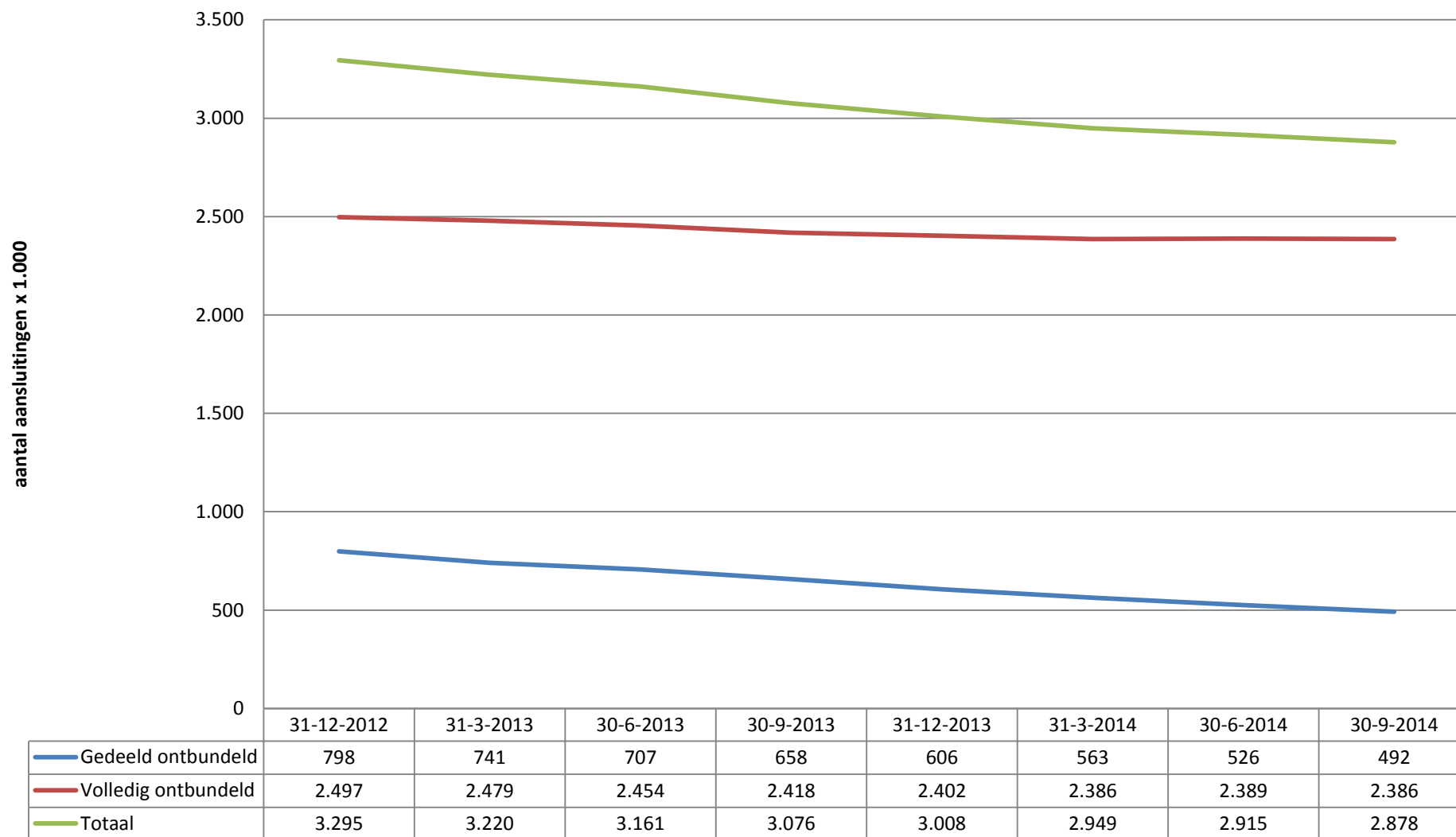
Vaste telefonie: Jaaromzet retail verkeer



	31-12-2010	31-12-2011	31-12-2012	31-12-2013
■ Totaal omzet verkeer	1.312.056	1.181.429	1.024.982	879.780
■ Omzet lokaal en nationaal verkeer	520.856	530.935	512.706	458.889
■ Omzet internationaal verkeer	158.399	145.061	123.978	108.541
■ Omzet vast naar mobiel verkeer	521.279	410.704	319.829	256.242
■ Omzet overig verkeer	111.521	94.730	68.470	56.108

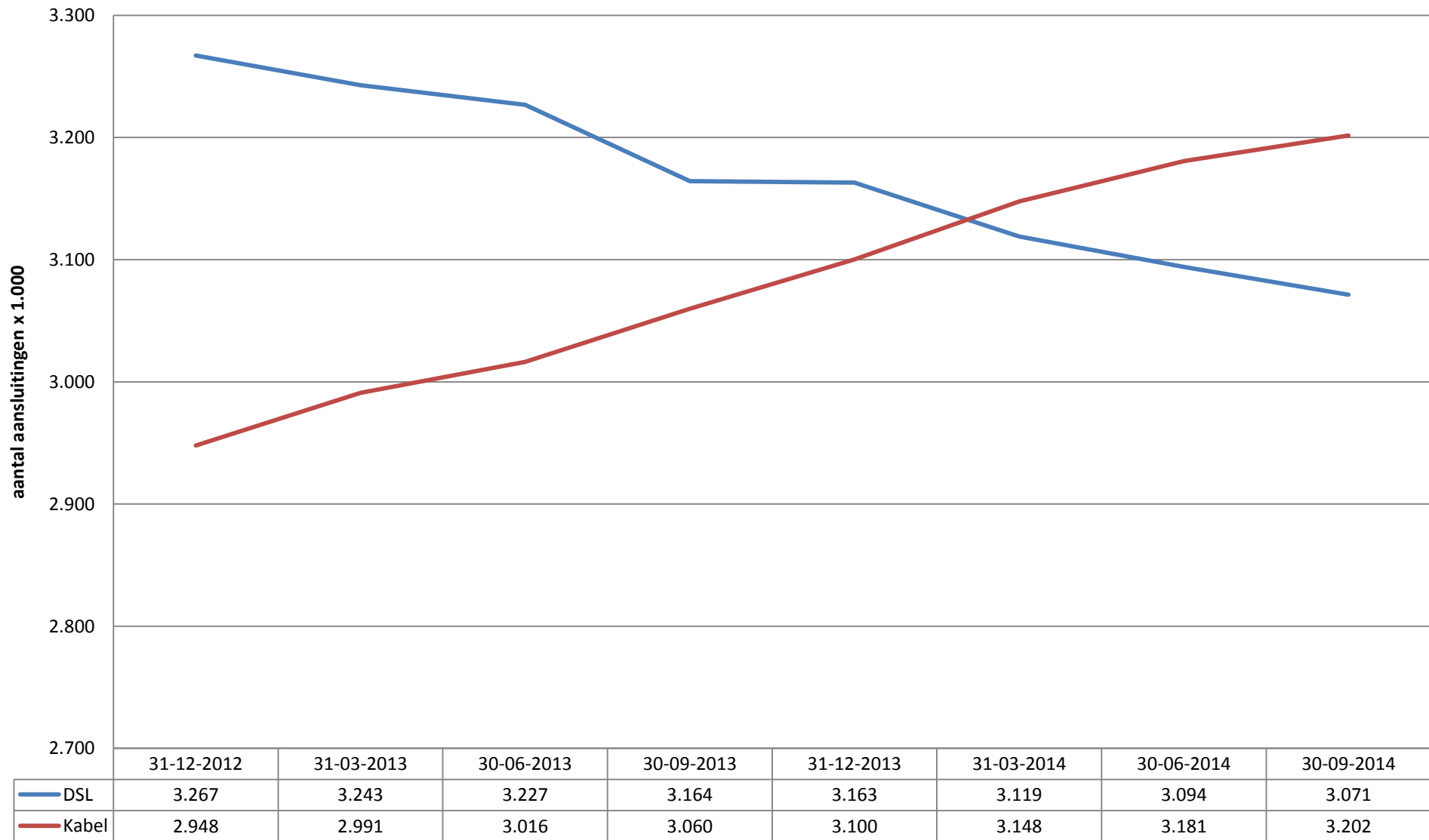


Breedband: ontbundelde MDF aansluitingen per type



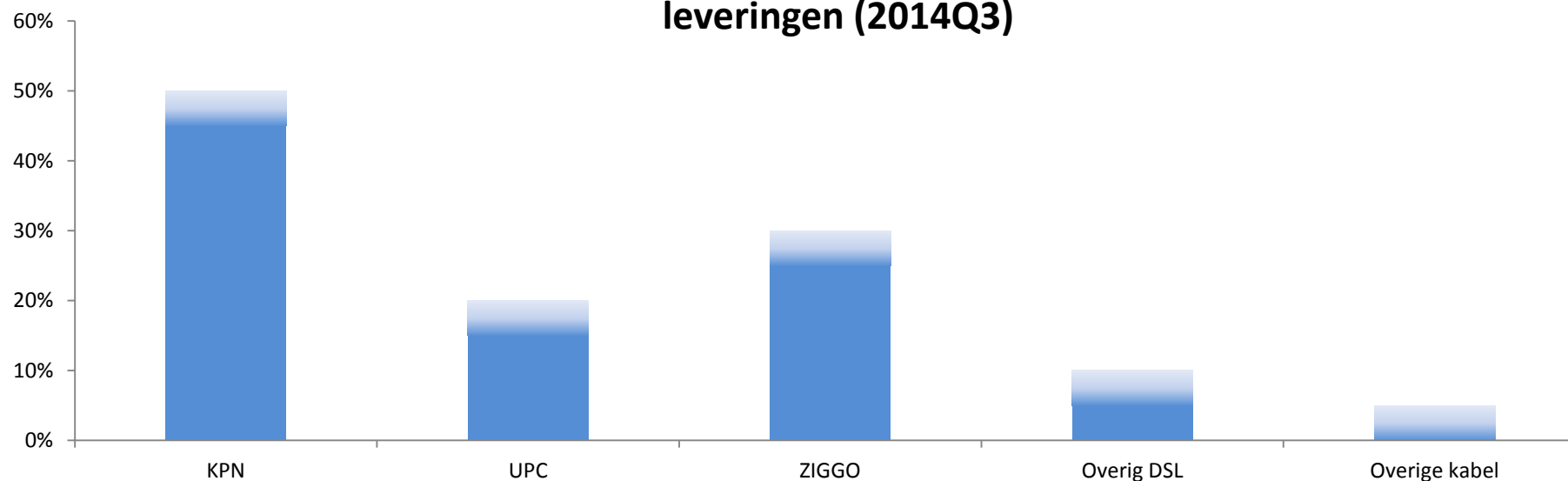


Breedband: WBT lage kwaliteit aansluitingen per type infrastructuur - inclusief interne leveringen





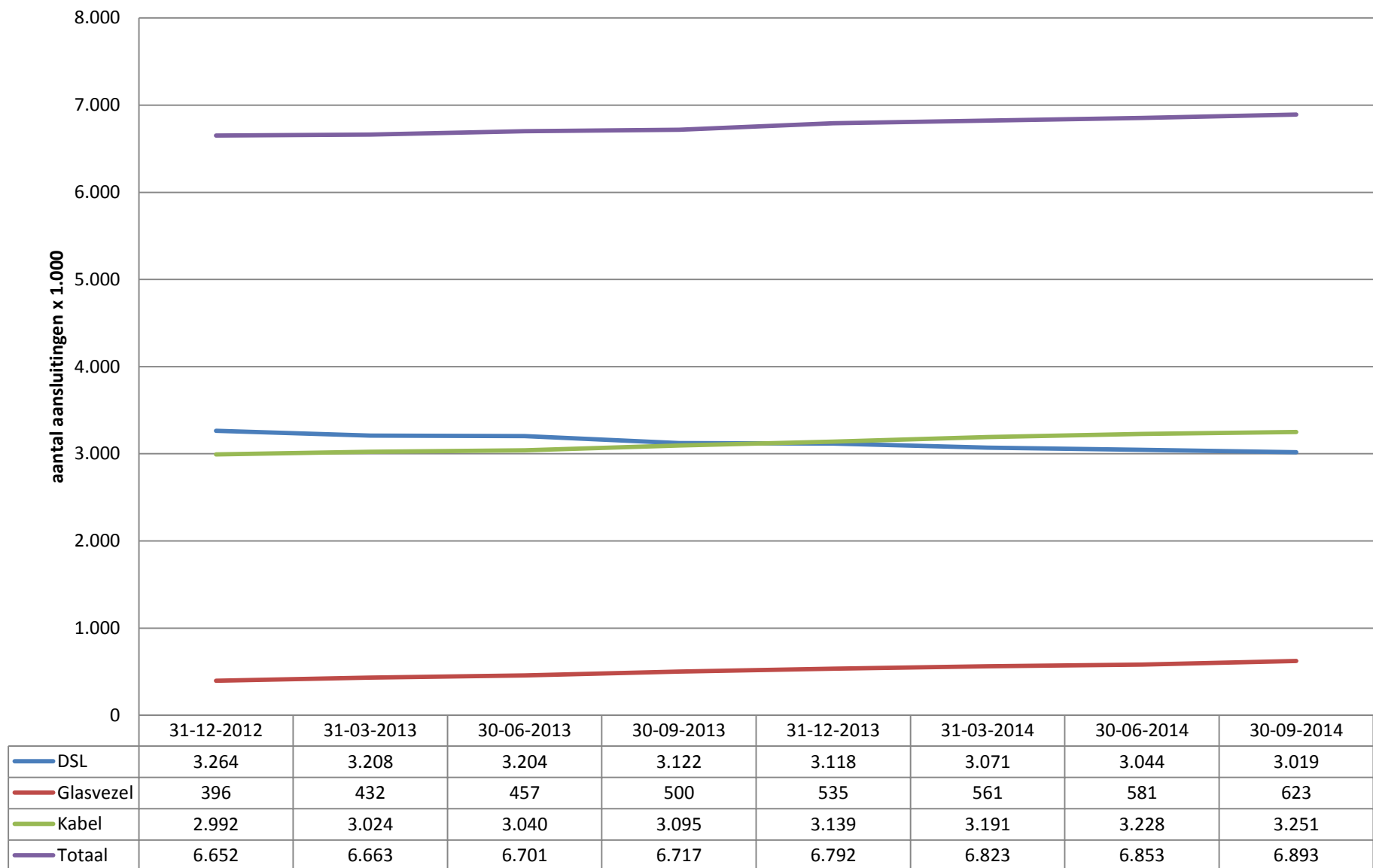
Breedband: marktaandeel WBT lage kwaliteit per partij - inclusief interne leveringen (2014Q3)



	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014	30-6-2014	30-9-2014
KPN	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]	[45 - 50%]
UPC	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]
ZIGGO	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
Overig DSL	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]
Overige kabel	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]

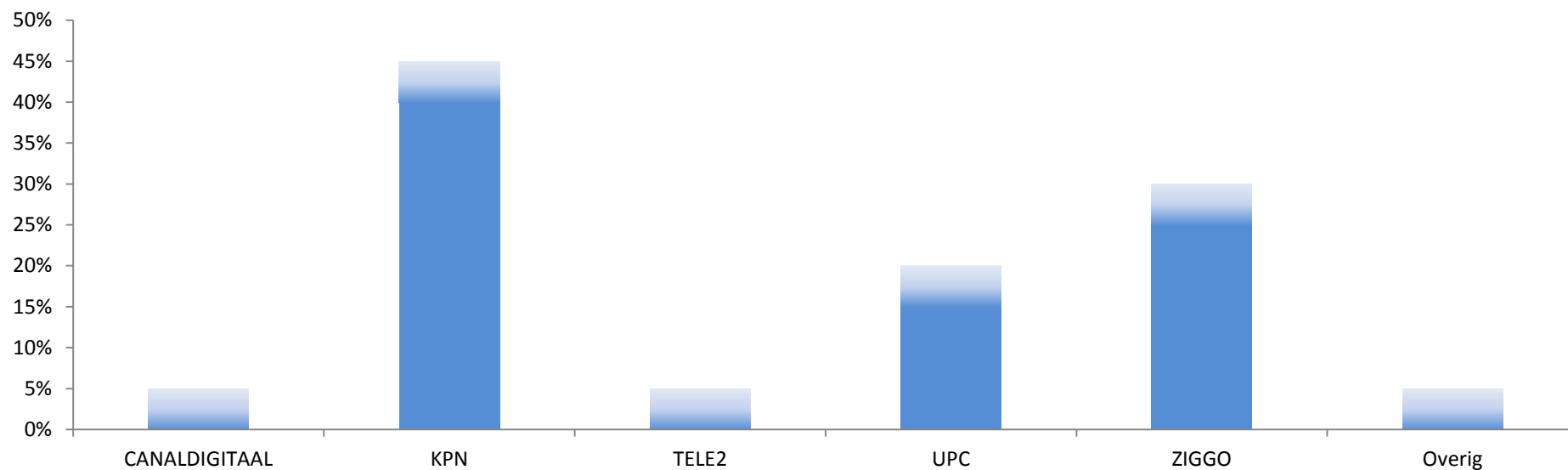


Breedband: retailsaansluitingen per type





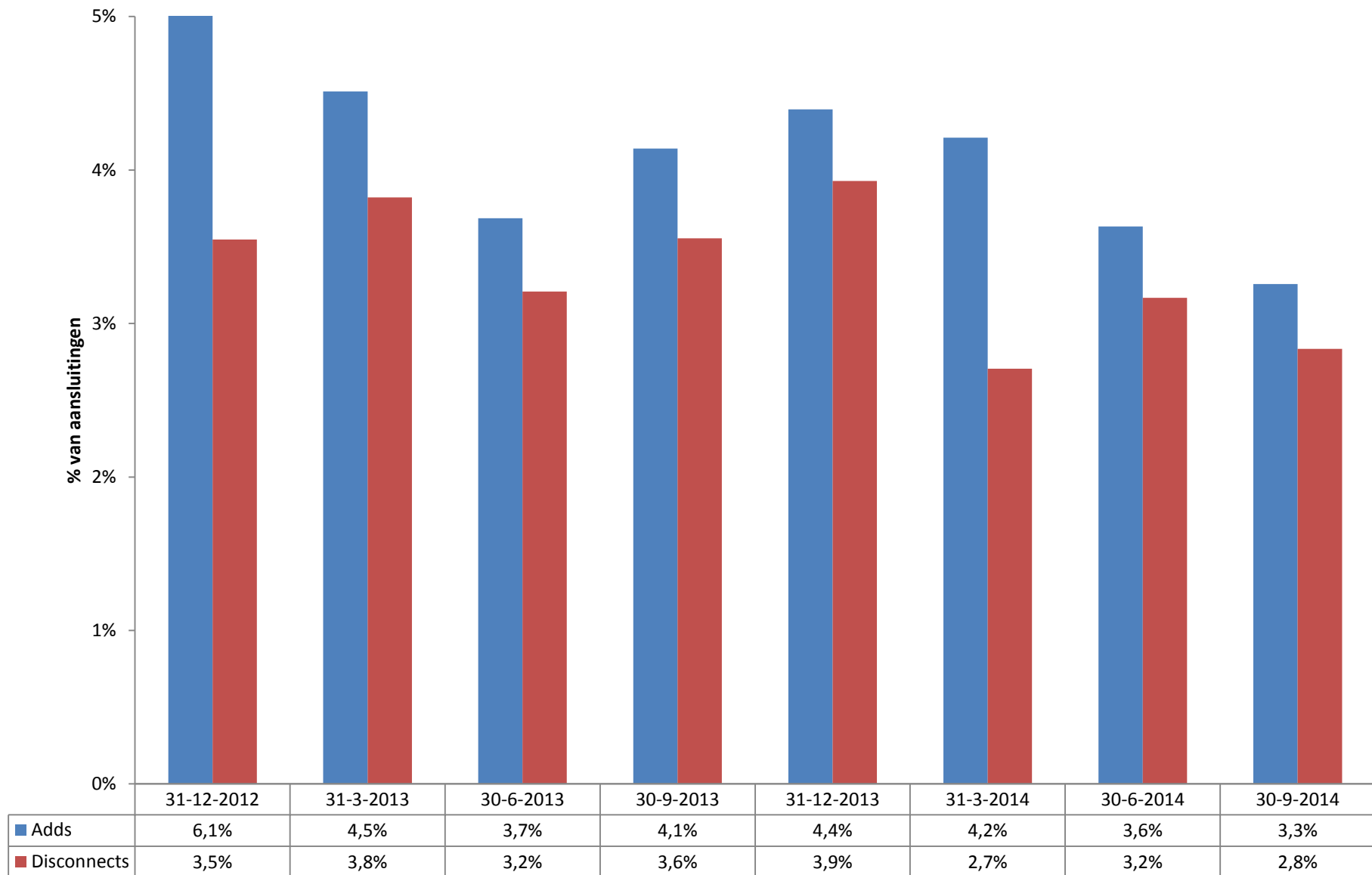
Breedband: marktaandeel retail per partij (2014Q3)



	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014	30-6-2014	30-9-2014
CANALDIGITAAL	-	-	-	-	-	-	[0 - 5%]	[0 - 5%]
KPN	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]	[40 - 45%]
TELE2	[5 - 10%]	[5 - 10%]	[5 - 10%]	[5 - 10%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]
T-MOBILE	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 5%]	[0 - 0%]	-	-
UPC	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]	[15 - 20%]
ZIGGO	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]	[25 - 30%]
Overig	[5 - 10%]	[5 - 10%]	[5 - 10%]	[0 - 5%]	[5 - 10%]	[0 - 5%]	[5 - 10%]	[0 - 5%]



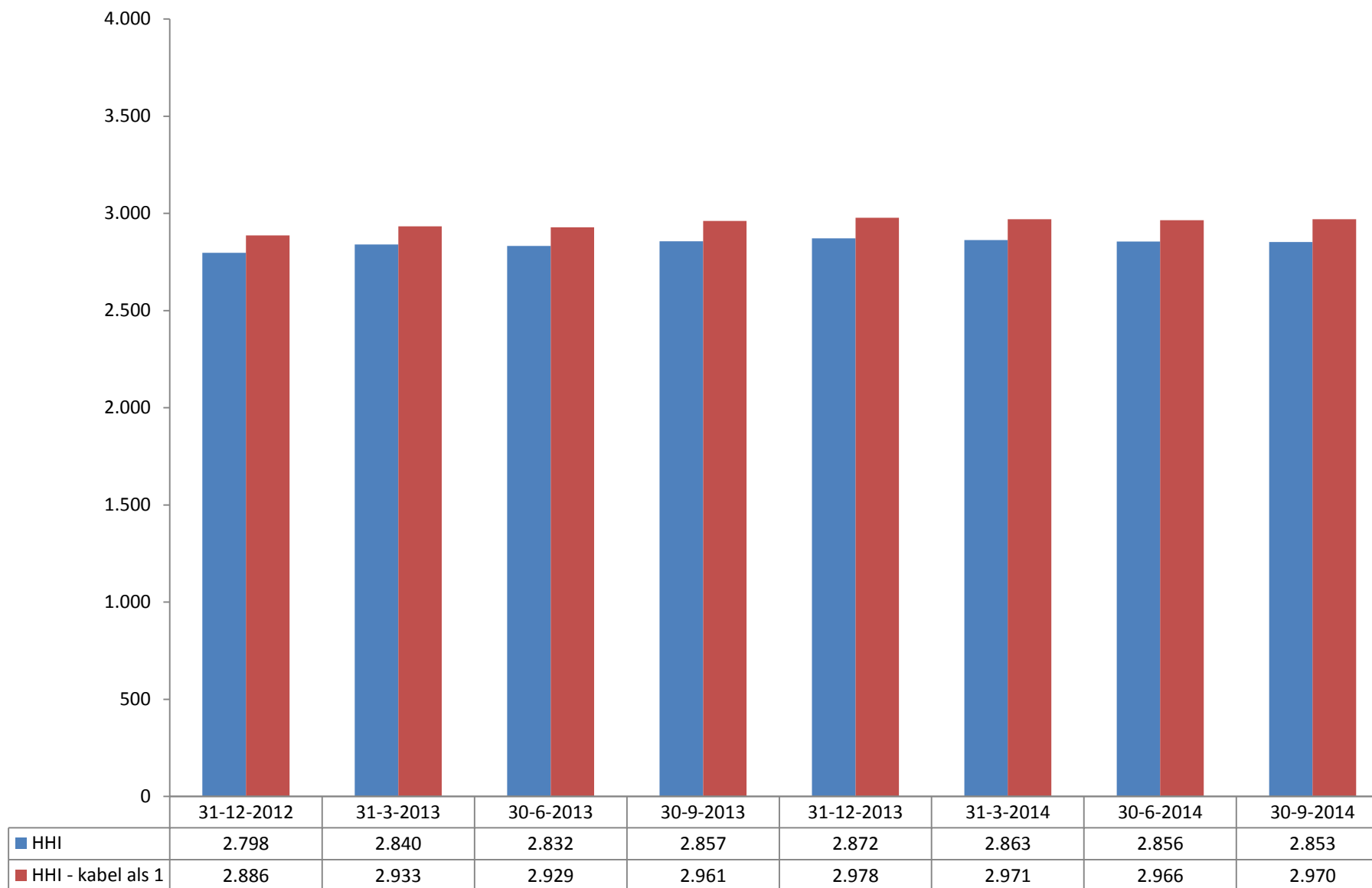
Breedband: Churn op basis van retailsaansluitingen



Op basis van vragen 3_E_13_1 en 3_E_13_2 van de Telecommonitor.



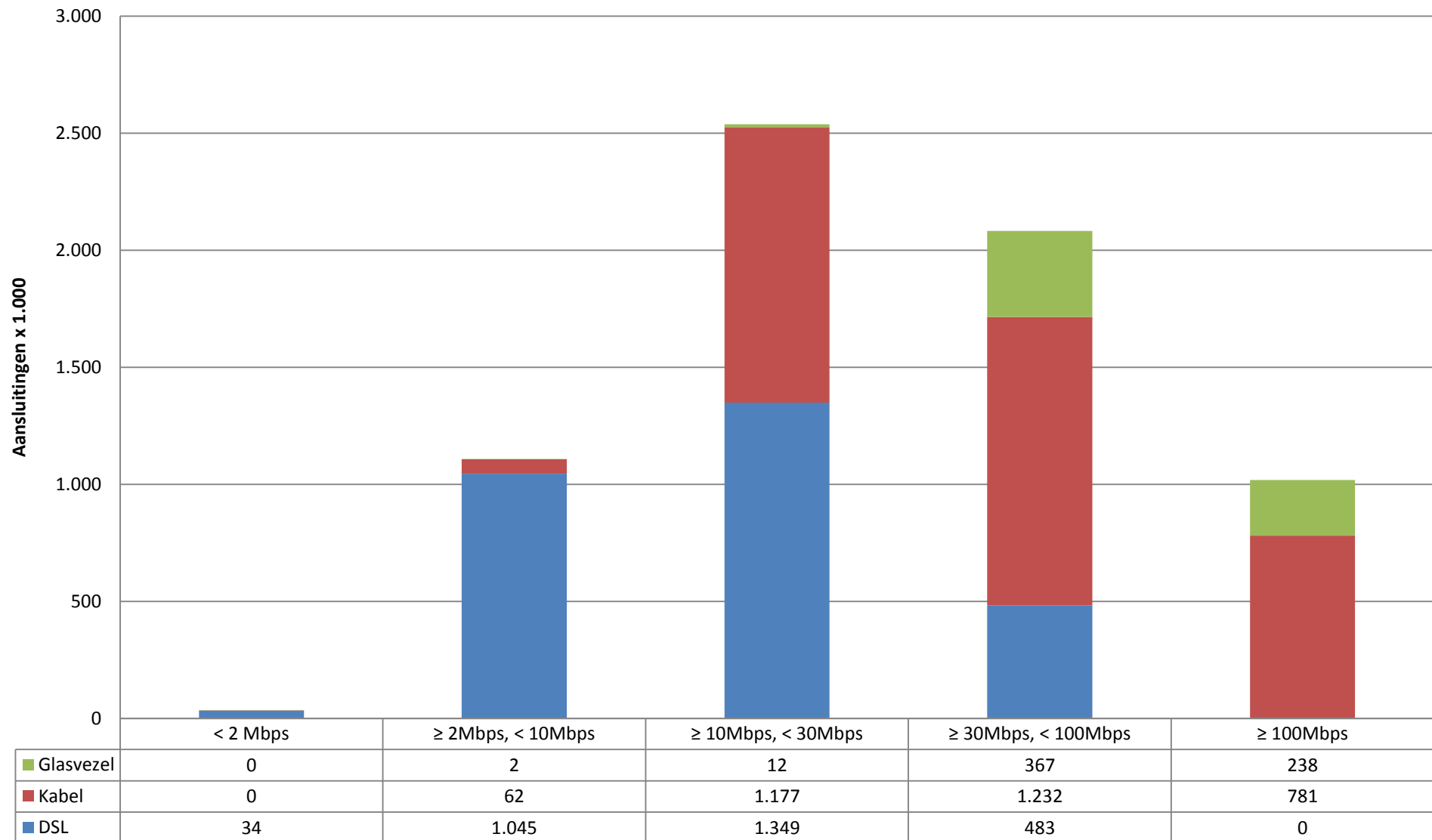
Breedband: HHI obv retailaansluitingen breedband



Op basis van vragen 3_A1_3_1-3, 3_A3_5_1-2-3-4 en 3_B_8_1-2-3-5 van de Telecommonitor.

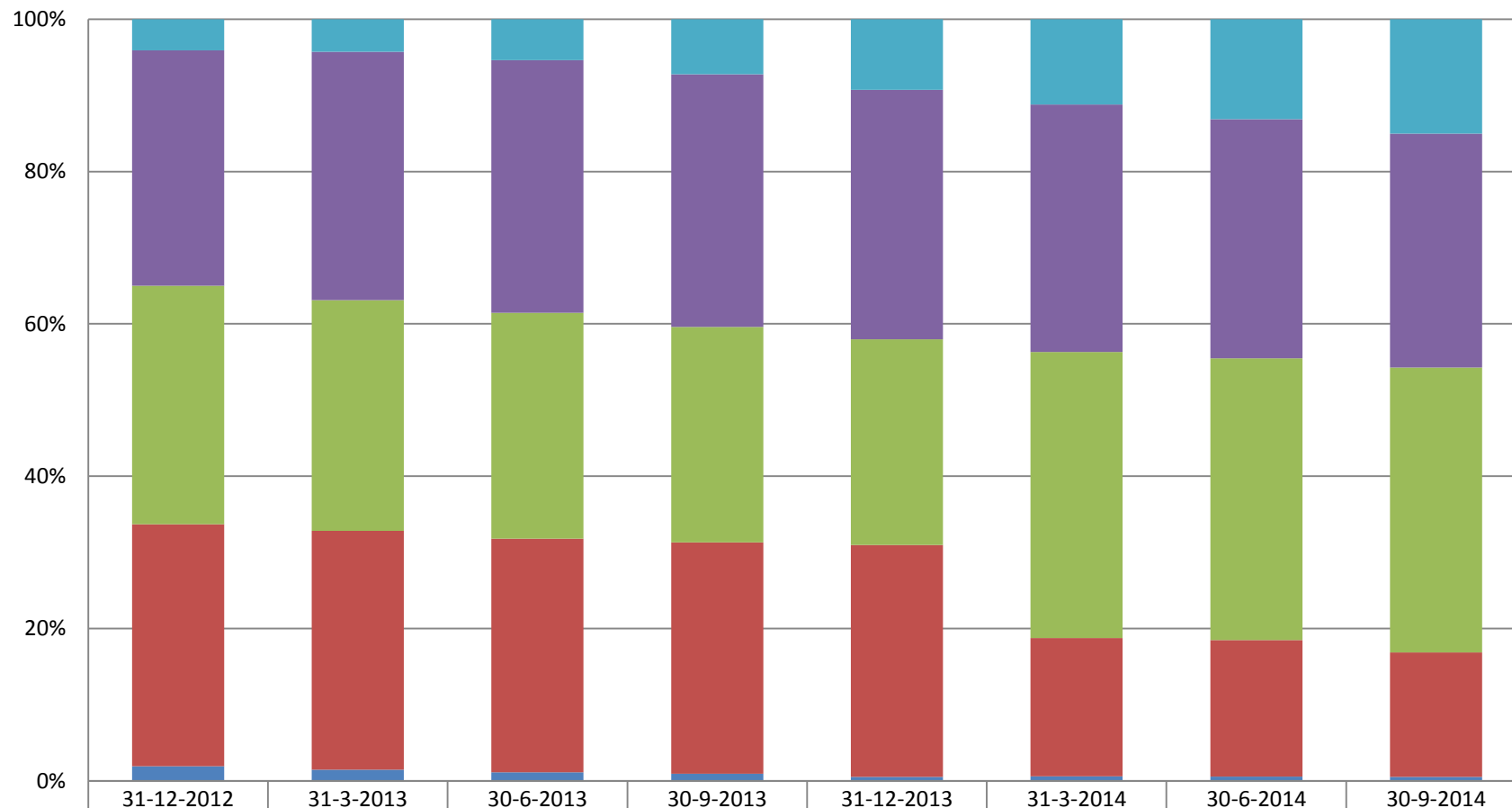


Breedband: retailaansluitingen naar snelheid en infrastructuur (2014Q3) (Exclusief wholesale leveringen)





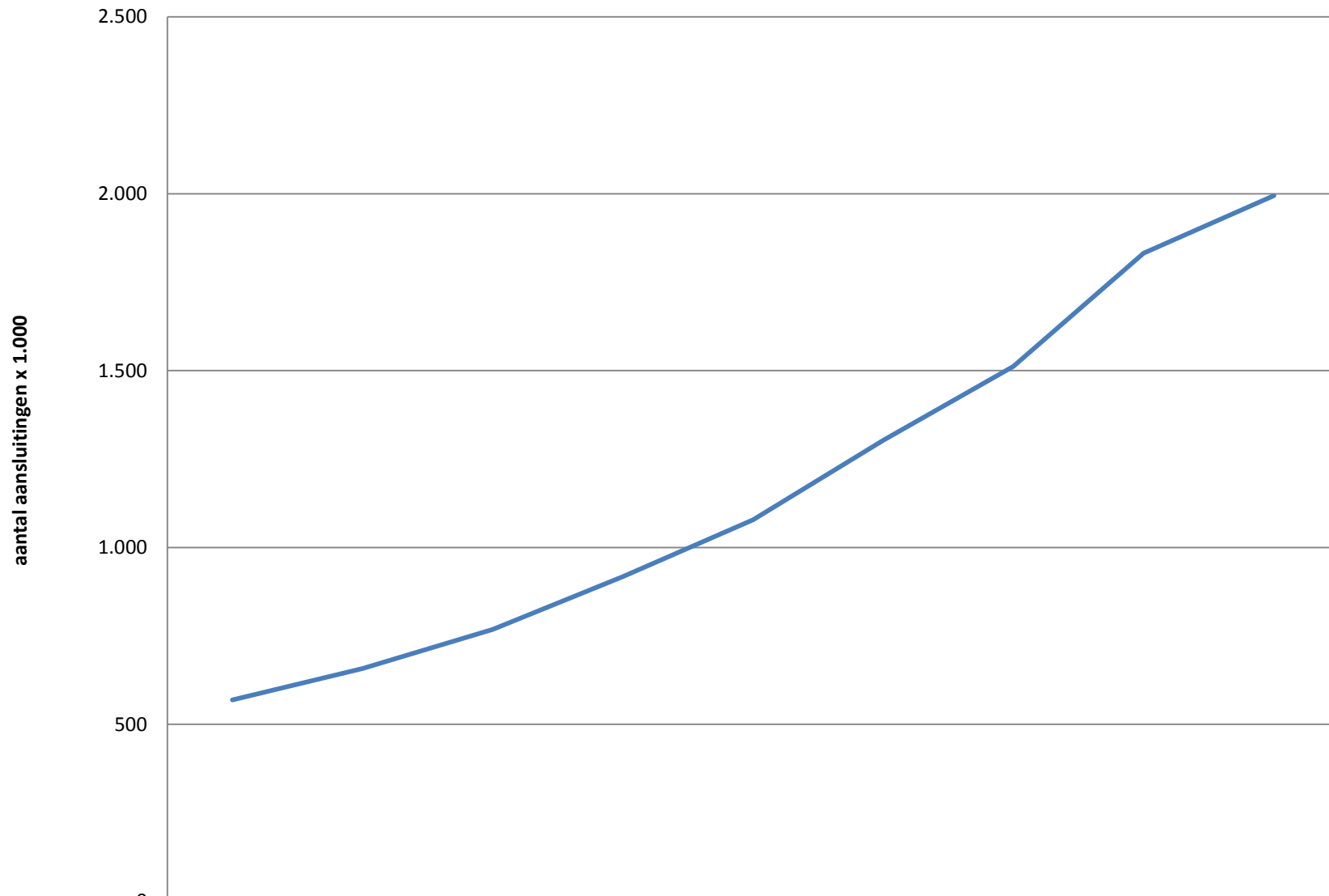
Breedband: retailaansluitingen naar snelheid (Exclusief wholesale leveringen)



	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014	30-6-2014	30-9-2014
≥ 100Mbps	4%	4%	5%	7%	9%	11%	13%	15%
≥ 30Mbps, < 100Mbps	31%	33%	33%	33%	33%	32%	31%	31%
≥ 10Mbps, < 30Mbps	31%	30%	30%	28%	27%	38%	37%	37%
≥ 2Mbps, < 10Mbps	32%	31%	31%	30%	30%	18%	18%	16%
< 2 Mbps	2%	1%	1%	1%	1%	1%	1%	1%



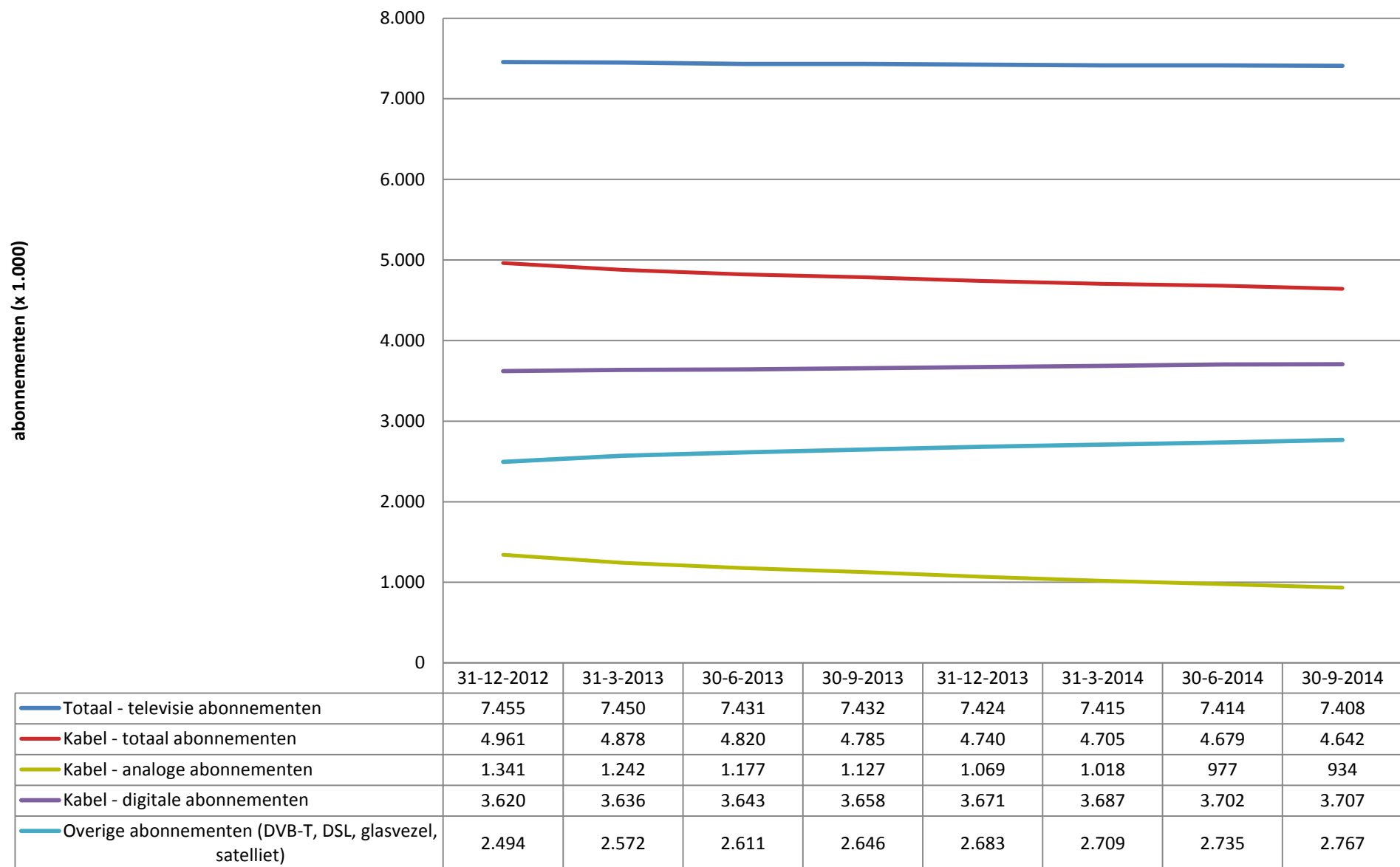
Breedband: homes connected (FttH)



	30-6-2010	31-12-2010	30-6-2011	31-12-2011	30-6-2012	31-12-2012	30-6-2013	31-12-2013	30-6-2014
Homes connected (FttH)	569	658	768	918	1.078	1.303	1.512	1.832	1.994

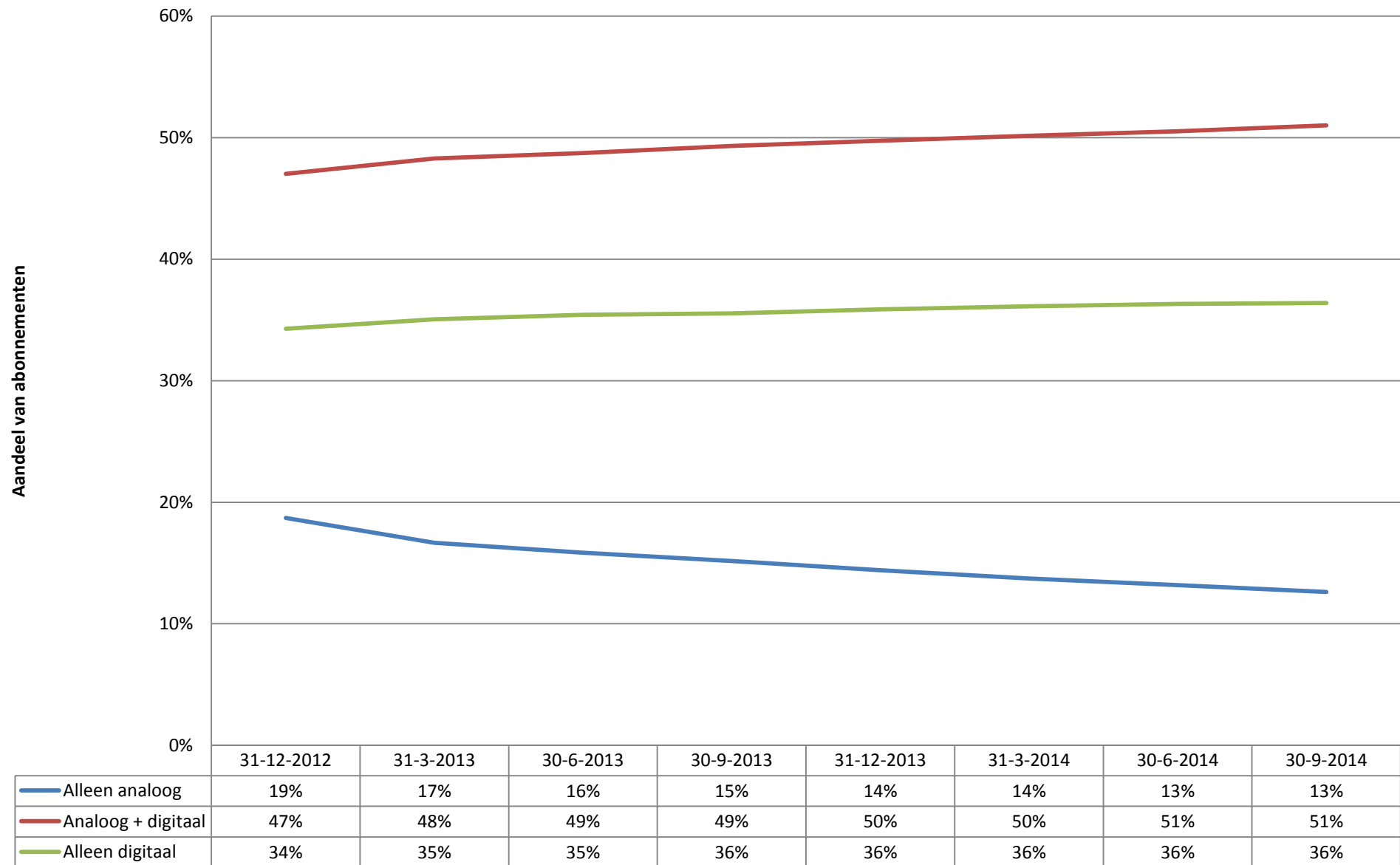


Televisie: abonnementen (standaardpakketten, landelijk)



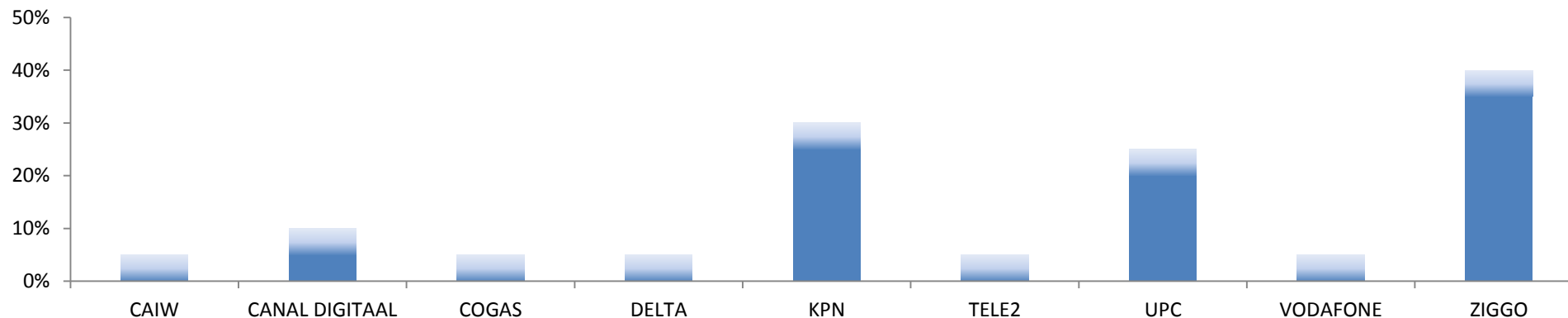


Televisie: digitalisering van abonnementen





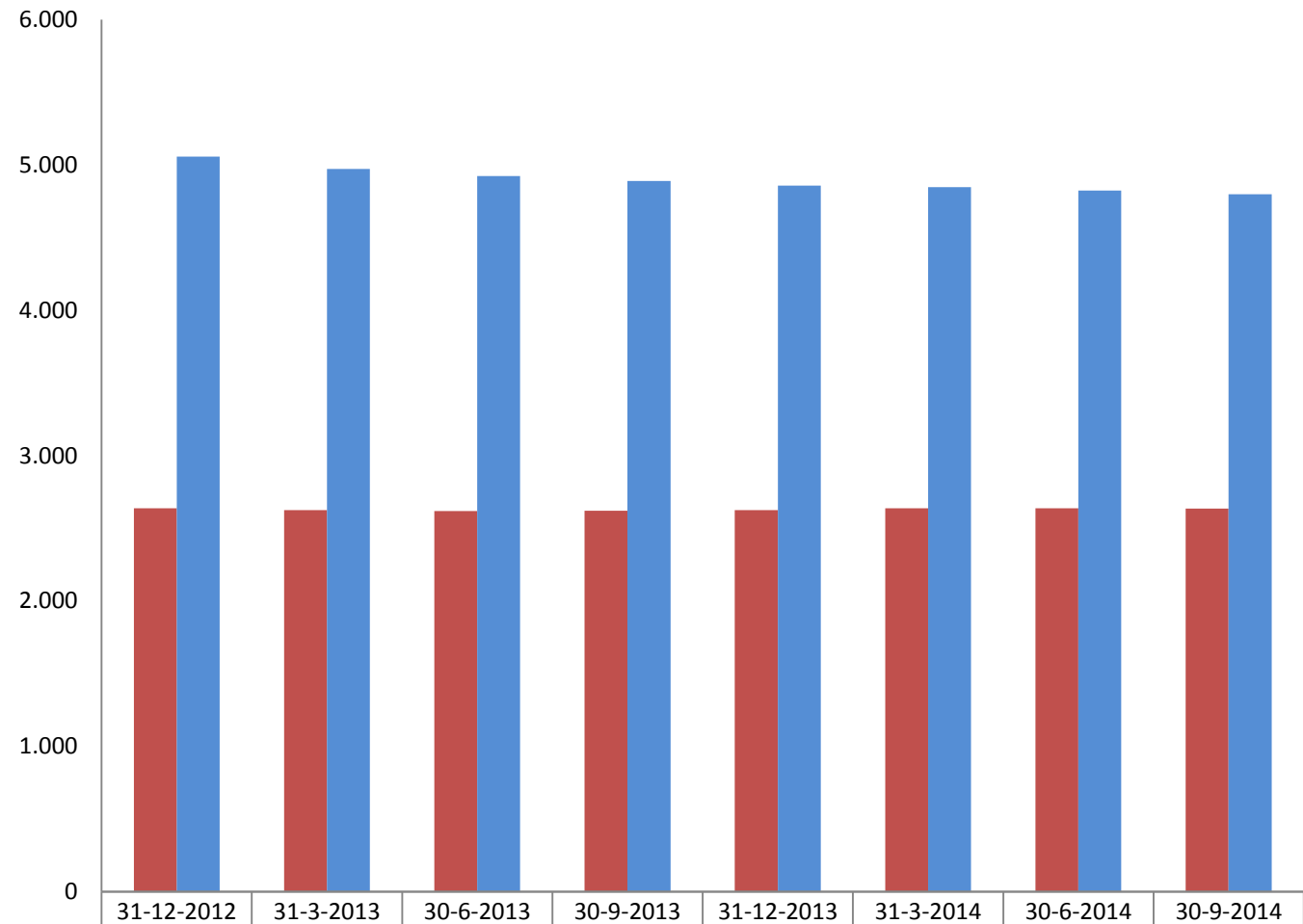
Televisie: Marktaandelen op basis van abonnementen (landelijk, 2014Q3)



	31-12-2012	31-3-2013	30-6-2013	30-9-2013	31-12-2013	31-3-2014	30-6-2014	30-9-2014
CAIW	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
CANAL DIGITAAL	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]	[5-10%]
COGAS	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
DELTA	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
KPN	[20-25%]	[20-25%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]	[25-30%]
TELE2	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
T-MOBILE	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	-	-	-
UPC	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]	[20-25%]
VODAFONE	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]	[0-5%]
ZIGGO	[35-40%]	[35-40%]	[35-40%]	[35-40%]	[35-40%]	[35-40%]	[35-40%]	[35-40%]



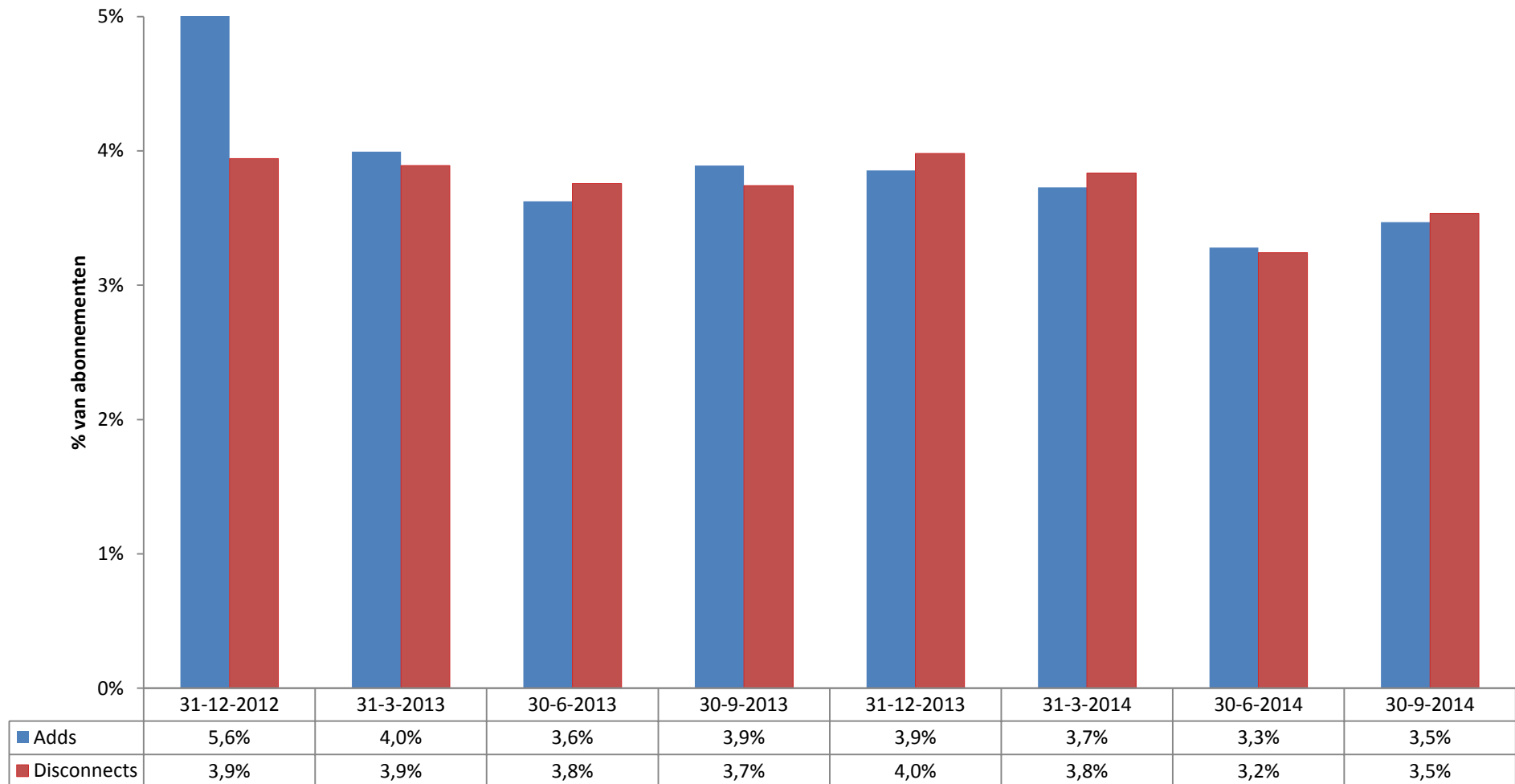
Televisie: Herfindahl-Hirschman Index op basis van RTV abonnementen (landelijk)



■ HHI concentratie-index abonnementen	2.637	2.624	2.619	2.621	2.624	2.637	2.637	2.635
■ HHI concentratie-index abonnementen, wanneer regionale kabelaanbieders gezamenlijk als 1 aanbieder tellen	5.058	4.973	4.924	4.890	4.858	4.846	4.825	4.799

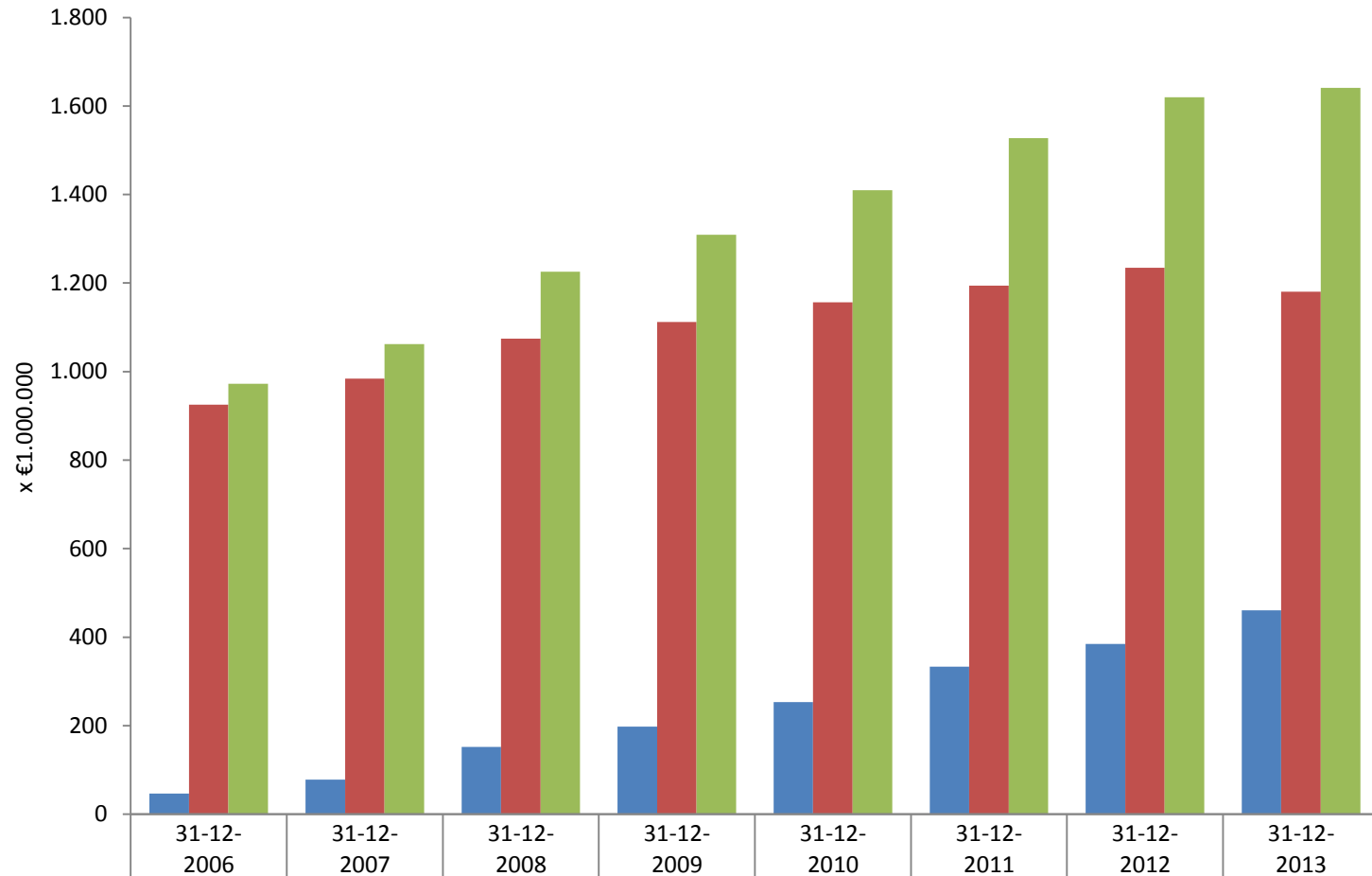


Televisie: Churn op basis van radio&TV abonnementen (standaardpakketten, landelijk)





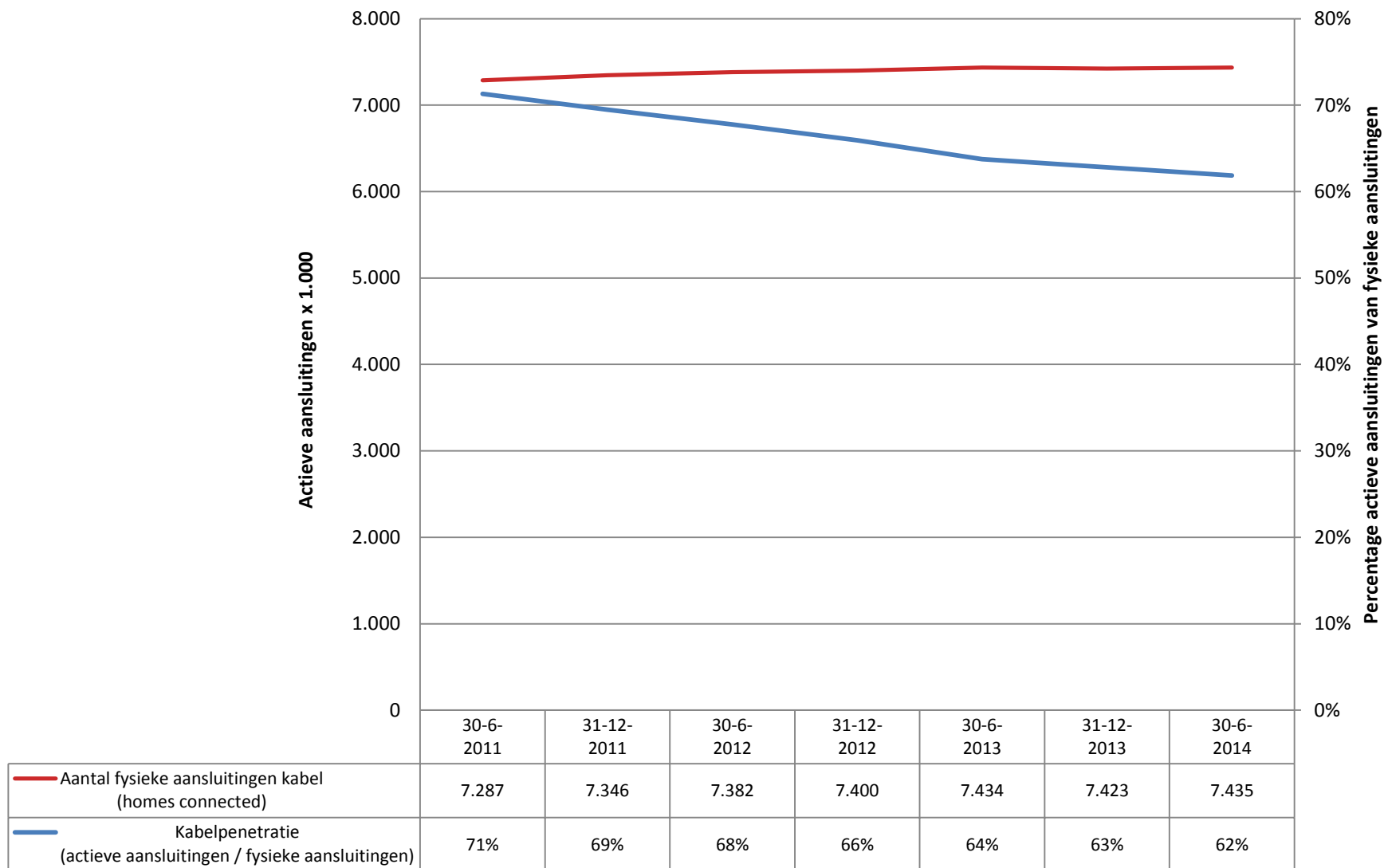
Televisie: Retail jaaromzet RTV abonnementen



■ Retailjaaromzet RTV van niet-kabel partijen geaggregeerd	47	78	152	198	254	333	385	461
■ Retailjaaromzet RTV van kabelpartijen geaggregeerd	925	984	1.074	1.112	1.156	1.194	1.235	1.180
■ Totale retailjaaromzet RTV abonnementen	972	1.062	1.226	1.309	1.410	1.527	1.619	1.641



Televisie: Gebruik van kabelnetwerken (landelijk)





Bevraagde marktpartijen

Gegevens worden per markt aangeleverd door onderstaande marktpartijen.

Algemeen		Mobiele diensten	
AT&T	MTTM (per Q4 2013)	KPN	
BT	Pretium	T-Mobile	
CAIW	Reggefiber	Vodafone	
CanalDigitaal	Stipte		
CIF (per Q4 2013)	Tele2		
Cogas	T-Mobile		
Colt	UPC		
Delta	UPC Business		
Easynet	Verizon		
EspritXB (tot Q3 2013)	Vodafone		
Eurofiber	Ziggo		
KPN			

Vaste telefonie		Breedband en netwerkdiensten	
AT&T	Reggefiber	AT&T	Reggefiber
BT	Stipte	BT	Tele2
CAIW	Tele2	CAIW	T-Mobile (tot Q1 2014)
CanalDigitaal (per Q1 2014)	T-Mobile (tot Q1 2014)	CanalDigitaal (per Q1 2014)	UPC
Colt	UPC	Colt	UPC Business
Delta	UPC Business	Delta	Verizon
EspritXB (tot Q3 2013)	Verizon	Easynet	Vodafone
KPN	Vodafone	Eurofiber	Ziggo
MTTM (per Q4 2013)	Ziggo	KPN	
Pretium			

Televisie		Multiplay	
CAIW	T-Mobile (tot Q1 2014)	CAIW	Tele2
CanalDigitaal	UPC	CanalDigitaal (per Q1 2014)	T-Mobile (tot Q1 2014)
Cogas	UPC Business	Cogas	UPC
Delta	Vodafone	Delta	UPC Business
KPN	Ziggo	KPN	Vodafone
Tele2		Stipte	Ziggo